Cities, Coast and Culture

Tyne and Wear Tourism Management Plan 2008 – 2011

Updated October 2009

Contents

Appendices

1. Introduction

"We plan to grow the visitor economy and ensure people have a good time."

Since the mid 90s, tourism and culture has been a major contributor to the Tyne and Wear economy - not only bringing visitor spend into the economy, but also improving the image of the area, stimulating regeneration, attracting investment and not least making it a better place to live.

Though agreeing this Area Tourism Management Plan (ATMaP) is one of the core responsibilities of the ATP Board, it is an action plan for **all** the organisations and businesses involved in the management, development and promotion of Tyne and Wear's 'visitor experience'. It should help partners to decide how to prioritise their support for and investment in the visitor economy and guide its development until 2010. These partners include the Local Authorities in Tyne and Wear: Gateshead Council, Newcastle City Council, North Tyneside Council, South Tyneside Council and Sunderland City Council, as well as One North East, attractions, accommodation providers and other tourism businesses.

It proposes a vision for Tyne and Wear's visitor economy that draws on its wonderful combination of city, culture and coast. It sets targets for growth and it identifies priorities and actions. In this way, the ATMaP provides a framework and rationale for investment in one of the major, growing sectors of the regional economy. In 2008 alone Tyne and Wear attracted over 39 million visitors to the area generating over £1.9billion of expenditure and supporting over 37,000 jobs. We hope that as many organisations as possible will identify with the vision, and will agree to play their part in delivering the actions outlined in this Plan.

The ATMaP is not principally about the use of public sector funding. It's a plan that aims to grow the visitor economy and ensure people have a good time. However, the priorities in this document should inform any potential allocation of single programme funding via the Regional Development Agency One NorthEast and includes a process to aid this decision making.

The ATMaP is a short to medium term action plan with the first three years shown in some detail, but some projects may need to be set in the context of a longer term strategic framework. This overview will be delivered in the North East Visitor Economy Strategy currently being developed by One NorthEast and the Area Tourism Partnerships. The ATMaP will be regularly updated particularly in relation to planned capital investment and changing tourism markets.

Guy Hilton – Chair, Tourism Tyne & Wear

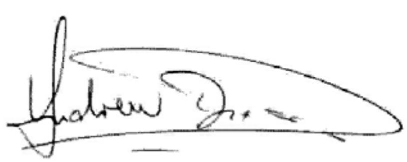
Forward from the Executive Director

Our simple vision is **'to grow the visitor economy and ensure that people have a good time'** when they come to Tyne and Wear. Underlying this simple vision there is a huge job to be done in making us a welcoming destination. We need to research and understand both our visitors and the perceptions of those who don't currently see us as a place to visit. We need the quality of attractions, events and product to get people here. We need an accessible transport system with quality products and information systems to enable and encourage people to move around and we need the range and quality of places for people to eat and stay. We need information in formats that people respond to and training for staff across the industry to ensure that the welcome is as strong at our customs points and in our taxis as it is in John Lewis' or a top hotel.

This is a three year plan but vision needs longer horizons. Cultural regeneration, new bridges, hotel investment, airport growth and country parks take time to build, grow and mature. The challenges facing the regeneration of our coast and countryside product can be resolved if we take a longer term view. Ten years ago it wasn't even a dream that the Port of Tyne would have been a major cruise terminal but it now handles over 30 cruises a year. It was inconceivable ten years ago that NewcastleGateshead would be voted England's favourite city break destination by the Guardian Observer travel awards but it is now an established city break destination and represents 31% of the tourism economy of the North East. Sunderland is starting on a similar journey and through this ATMaP and its commitment to infrastructure improvements such as the new Sunderland Aquatic Centre, it will also carve out a future role in tourism.

The next ten years offer the opportunity to reposition the heritage offer of Tyne and Wear with the potential for Wearmouth-Jarrow to become a world heritage site and for us to capitalise on the legacy of some our first international visitors – The Romans through our strong partnership with Hadrian's Wall Heritage.

Tourists don't accept political boundaries and we must therefore strive to offer them the best that Tyne and Wear and the North East can offer by using the language that attracts them to come in the first place and legibility in our signage to move them around. Within the next ten years we will have the most welcoming airport in the UK, a new world class conference facility, a second world heritage site, the best light transit rail system in the UK, over 2000 new hotel rooms, major new attractions and a revitalised coast where our natural assets attract people to be active and healthy. We will benefit from major new attractions in Durham, Northumberland and Tees Valley adding to the offer in Tyne and Wear.



Andrew Dixon – Executive Director, Tourism Tyne & Wear

2. ATMaP Context and Background

2.1 Strategic Framework: Vision and Aims

The **national Tourism Policy** *Winning: A Tourism Strategy for 2012 and Beyond* aims to "improve the quality of life for all through cultural and sporting activities, support the pursuit of excellence, and champion the tourism, creative and leisure industries". The vision is:

- To grow the UK visitor economy faster than would otherwise be possible
- To spread the economic benefits throughout the UK
- To boost both international and domestic tourism
- To create a truly world class tourism industry
- To secure a lasting legacy through sustained growth after 2012

The **Regional Economic Strategy** (RES) identified Tourism and Hospitality as one of nine key sectors. The RES was signed off in 2006 and the linked Action Plan was finalised in 2007. The vision for the region is:

"The North East will be a region where present and future generations have a high quality of life. It will be a vibrant, self-reliant, ambitious and outward-looking region featuring a dynamic economy, a healthy environment and a distinctive culture. Everyone will have the opportunity to realise their full potential."

The RES aims to:

- Increase GVA per person to 90% of the national average
- Increase employment by between 61,000 and 73,000 new jobs
- Create between 18,500 and 22,000 new businesses over the next 10 years

The Sub-National Review introduced the notion of the **Integrated Regional Strategy (IRS)**, to be led by the Regional Development Agency in partnership with key bodies including local authorities. The current focus is on developing the evidence base The IRS will build on existing strategic consensus (e.g. RES and RSS).

The **Regional Tourism Strategy** was produced in 2005, and aims to increase the economic contribution of tourism through the objectives set out in Section 2.2. A new strategy is currently being prepared, for publication early in 2010.

A review of the **Marketing Framework** 2006-08 has recently been completed and a new framework has been delivered.

Tyne and Wear will play a big part in realising the Vision for the North East - with city break and business tourism in particular. Tyne and Wear accounts for 50% of all visitor expenditure in the region (Tourism in North East England Key Facts 2006) and visitor activity is less seasonal than other parts of the region.

The Vision for Tyne and Wear's tourism offer is to grow the visitor economy and ensure people have a good time. This is based on its combination of cities and coast with an outstanding cultural offer. Our ambition is that:

Cities, Coast and Culture …

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. This brings economic benefit through spend and jobs and provides a major contribution to the regeneration, quality of life and pride of our communities.

The strategic priorities and actions required to deliver this Vision are detailed in Section 3.2.

The range of strategies used to develop the ATMaP are outlined in Appendix 1.

2.2 Objectives and Targets

2.2.1 Objectives

The Regional Tourism Strategy contains 10 specific objectives and targets. These are summarised in the following table along with some Tyne and Wear targets for 2010:

1. Attract more domestic and international visitors to the region

Number of visitors	Baseline (2005)	2008	Target
North East	8 million	8.3 million	**10 million**
Tyne & Wear	3.2 million	3.1 million	**4 million**

2. Increase the spend of tourists and day visitors

Spend per visitor	Day Visitors			Tourists		
	Baseline	2008	Target	Baseline	2008	Target
North East	£26.36	£24.87	**£29.00**	£160.29	£168.30	**£171.59**
Tyne & Wear	£30.18	£29.79	**£33.20**	£163.38	£170.83	**£174.80**

3. Increase visitors staying in commercial accommodation throughout the year, not solely through the main holiday season.

Reducing seasonality	North East				Tyne & Wear			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Baseline 2005	17%	29%	34%	20%	22%	27%	29%	22%
2008	16%	29%	34%	22%	22%	25%	27%	26%
Target	**21%**	**25%**	**30%**	**24%**	**23%**	**26%**	**28%**	**23%**

4. Increase employment in Tourism related businesses

People employed in Tourism	Baseline (2005)	2008	Target
North East	53,184	64,055	**69,106**
Tyne & Wear	24,650	31,167	**31,891**

5. Improve the productivity of the Regional Tourism Economy

6. Accelerate the rate of investment in tourism product

7. Improve the quality of the Tourism Product in the North East

Quality product	Number	Quality Assessed	% Assessed
Accommodation Providers	266	170	**64%**
Attractions	119	15	**13%**

8. Improve the quality of the tourism workforce in the North East

9. Improve levels of visitor satisfaction in the North East

The tables below show the percentage of visitors who rated elements of the visit as either good or very good.

	2008			
	Accommodation	**Bars and restaurants**	**Attractions**	**Shopping**
All visitors		93%	93%	92%
Overnight visitors	94%	93%	98%	93%
Overseas visitors	95%	98%	92%	94%

10. Enhance and conserve the region's natural, heritage and cultural assets

Four of these objectives are useful indicators when measuring the development of the visitor economy within Tyne and Wear:

- 1. Attract more domestic and international visitors to the region.
- 2. Increase tourists' (T) average spend and increase day visitor (D) spend
- 4. Increase employment in tourism and tourism-related businesses.
- 9. Improve levels of visitor satisfaction in the North East

2.2.2 Additional Performance measures

As well as the indicators set out above there are additional destination performance indicators that we continue to track and monitor to provide further indication of the performance and growth of the industry. These additional performance measures are:

- Accommodation stock for both serviced and non serviced accommodation
- Hotel Occupancy and booking patterns
- Visitor attractions attendance numbers
- International transport links and visitor numbers

The following section provides a summary of performance and recent trends against these indicators within Tyne & Wear.

2.3 Industry Performance

2.3.1 The National Context

The recent Deloitte study ‘The Economic Case for the Visitor Economy’ estimated that taking the direct and indirect impact of tourism together, the sector was worth £114.4bn in 2007, equivalent to 8.2% of UK Gross Domestic Product.

The report also showed that the sector supported over 2.6 million jobs, 1.4 million directly and a further 1.3 million indirectly. Jobs supported by tourism account for 4.3% of all employment while combining this with indirect sees the number of jobs being equivalent to 8.4% of all jobs.

In 2008 ***UK residents*** took 117.7 million overnight trips within the UK, spending £21.1 billion. Trips have declined by an average 5% per year over the last five years, and spend by 4% per year. (Source: United Kingdom Tourism Survey).

31.8 million ***international visitors*** visited the UK, spending £16 billion. While trips have decreased by an average of 6% per year over the last five years, spend has increased by 3%. (Source: International Passenger Survey). The top five inbound markets are USA, Germany, France, Irish Republic and Spain, and key emerging markets have been identified as China, India and the new European countries.

UK ***room occupancy rates*** in serviced accommodation have increased slightly over the last five years, from 59% in 2003 to 60% in 2008. Hotels have consistently higher occupancy rates than B&Bs (64% and 45% in 2008), and properties in large towns have higher rates than those in the countryside (69% and 49%). The average unit occupancy for self catering in the North East for 2008 was 55%. There is no national survey but the occupancy can be compared with Cumbria (59%) and Yorkshire (58%).

Visits to Attractions increased by 2% from 2007 to 2008, with the strongest growth in visits to farms. museums and galleries and visitor/heritage centres.

2.3.2 The Regional Context

The North East economy is undergoing profound structural change, moving from a largely industrial to a knowledge-driven economy. The region had the fastest growing economy in the UK in per capita terms for both 2005 and 2006. Regional economic policy focuses on the “three pillars” of energy and the environment, health care and health sciences, and process industries.

Tourism supports, directly and indirectly, 76,531 FTE jobs in the region (5.8% of the region’s workers). It contributes 4.6% of the region’s GVA (£1.7bn) (Durham University, 2007).

Overall, the number of overnight visitors to the region increased by 14% from 2003 to 2007,.. The number of visitors from the UK has fallen over the last five years, inline with national trends, while the number of international visitors has increased by 8%. Recently DFDS Seaways has ceased operating ferries from Stavanger to Newcastle, but new air routes have opened from Stavanger, Copenhagen, Dublin and Brussels, as well as the Emirates route to Dubai which opens up the Australasian market.

Capital investment in tourism has been strong over the last five years, with several new attractions opening such as The Sage Gateshead, Great North Museum (Newcastle), Saltholme (Tees Valley), Alnwick Gardens and Middlesbrough Institute for Modern Art. New accommodation establishments have also opened, however, occupancy rates and visitor numbers to attractions have held up, with hotel room occupancy increasing from 56% (2003) to 69% (2008) and self catering unit occupancy stable at 55%. This indicates that demand remains strong, particularly in urban areas, although there are indications that there is an over-supply in the rural areas, particularly in the guesthouse/B&B sector.

Despite the current economic climate the region is regarded as a good place to invest, with developments such as Rockliffe Hall in Hurworth and Jury’s Inn in Gateshead due to open in the next 12 months as well as significant investment in attraction such as the Bowes Museum.

2.3.3 Tyne and Wear Context

The profile of Tyne and Wear's visitor economy is distinctly different from the rest of the North East with its unique offer of coastal, urban and cultural product. The last decade has seen a transformation of the tourism product and experience on offer within Tyne and Wear.

In NewcastleGateshead there has been major investment in cultural attractions including the Arena, BALTIC Centre for Contemporary Art, the Angel of the North, The Sage Gateshead, Seven Stories, the Centre for Life, Discovery Museum, the redevelopment of Theatre Royal, Live theatre and Tyneside Cinema and most recently £26million development of the new Great North Museum which welcomed 175,000 visitors in its first 5 weeks.

The successful delivery of these major iconic projects has acted as a catalyst for increasing confidence and belief in the area as a quality visitor destination among residents, visitors and investors. Visitor numbers are increasing year on year along with local employment within the sector, with many national and international hotel chains investing in this growth. The area has 1,300 new hotel beds in the last 6 years, an increase of 15%.

The NewcastleGateshead visitor market is of massive importance to both the sub regional and regional visitor economies. In 2008 NewcastleGateshead attracted an estimated 18.7million visitors, generating around 1.1 billion of revenue. This equates to 61% of the total revenue generated through the visitor economy of Tyne and Wear and 31% of the North East in total.

NewcastleGateshead also accounts for a large majority of visitors who stay within serviced accommodation within Tyne and Wear with around 63% of visits to the Sub Region that use serviced accommodation taking place within NewcastleGateshead. This accounts for 71% of all revenue generated by visitors of this category within Tyne and Wear.

The Business Tourism market is extremely important within Tyne and Wear. Regionally, previous studies suggest that business tourism represents 23% of all domestic trips and 32% of domestic tourism spending. NewcastleGateshead is a key driver of this market with The Sage Gateshead's Hall 1 providing the Region's best large conference space. In recent years the area has attracted some very large scale, high profile conferences, including:

- British Association for Applied Linguistics – estimated economic impact £414,900
- XXI International Limes (Roman Frontiers) Congress – estimated economic impact £1,067,500
- MS Life 2009 – estimated economic impact £610,000
- 7th International Conference for Priorities in Healthcare – estimated economic impact £436,800
- Conservative Spring Conference 2008 – estimated economic impact £1.5 million
- Arts Marketing Association 2008 – estimated economic impact £539,000
- British Society for Parasitology 2008 – estimated economic impact £500,000

Large conferences confirmed for the coming years include:

- UNISON Black Members Conference 2010 – estimated economic impact £640,500
- NUS Annual Conference 2010 and 2011 – estimated economic impact £1.3 million (per conference)
- British Association for Sexual Health and HIV (BASHH) 2011 – estimated economic impact £691,500
- European Association of Neurosurgical Societies 2011 – estimated economic impact £509,600
- European Society for Paediatric Research 2011 – estimated economic impact £1,310,400
- World Congress of Accounting Historians 2012 – estimated economic impact £509,600
- International Colour Association 2013 – estimated economic impact £910,000

Sunderland continues to expand and develop its tourism infrastructure with the ongoing development of significant cultural assets including the Sunderland Museum and Winter Gardens, Monkwearmouth Station Museum and The Sunderland Aquatic Centre, which has formed the basis of a sporting park with the Stadium of Light. Herrington Country Park is being developed as the regions premier outdoor events arena whilst the historic area of Sunniside continues to expand the cities tourism offer with cafes, bar shops and restaurants.

The coastal Local Authorities of North Tyneside, South Tyneside and Sunderland are all pursuing major regeneration initiatives that will impact positively on the sub-region's visitor economy and improve the infrastructure for cultural events and sporting activities. The joint coastal strategy will address issues surrounding the decline in coastal tourism and facilities. Whitley Bay is benefiting from £60 million regeneration. South Tyneside have relieved Sea Change funding to support foreshore development while North Tyneside and Sunderland are awaiting the outcome of bids to this funder.

The public consultation for the UK's 2010 nomination for World Heritage Site status at the twin Anglo-Saxon monastery of Wearmouth Jarrow was completed in July 2009. If the site is awarded World Heritage Site status it will be the second World Heritage Site in Tyne and Wear and the third in the North East. The Tyne and Wear attractions of Arbeia and Segedunum along the Hadrian's Wall World Heritage Site continue to draw visitors to the region and a major investment programme for Hadrian's Wall corridor and the Roman Frontier concept is underway.

The growth of Newcastle International Airport has had a major impact on ease of travel for both domestic and international markets. It is key to the development of Tyne and Wear as the region's largest airport handling over 5 million passengers a year across 85 destinations, based on a mix of scheduled, chartered and low cost flights. 2008 saw some significant developments in opening up the area to a host of new markets, some of these developments include:

- The launch of the Emirates route to Dubai
- Eastern Airways introducing its first non-stop service from Newcastle to Stavanger
- An increase in the frequency of flights from Newcastle to Brussels

The Port of Tyne, which won Port Operator of the Year in 2008, is an important gateway to European markets as well as the base for the region's growth in cruise tourism. 2009 saw 23 cruise ships berth at the port.

DFDS ferries continue to bring significant numbers of visitors to the area from the Netherlands and Germany with the Newcastle – Amsterdam route going from strength to strength in 2009. Work is continuing on assessing the feasibility of reopening a route with Norway in the future.

Over the next 10 years, the Metro system will undergo a £300 million reinvigoration programme increasing the connectivity, comfort, safety and experience of travelling within Tyne & Wear. The first stage of this process is due to be completed in late 2009 with £20million iconic re-development of the Haymarket metro station.

The results of the Tyne and Wear wide and NewcastleGateshead and Sunderland Legible City projects will come to fruition in the next five years providing massive benefit to the sub region through mapping, signage and infrastructure improvements.

Shopping, nightlife and sightseeing continue to be the biggest draws for visitors to Tyne & Wear, especially among overseas visitors from the Netherlands and Ireland. The Metro Centre, Eldon square, NewcastleGateshead Quayside and fantastic stretch of coastline are key draws in this respect.

2.3.4 Tyne and Wear Performance and Trends

Recent trends in destination performance within Tyne & Wear must be considered within the wider context of the changes taking place within the economy and the influence this is having on the tourism industry and consumer consumption patterns. On the whole the last 5 years have seen fairly consistent growth within the area across most indicators, but this latest period is posing some very hard challenges for the sector. Leisure visitors are reducing breaks and expecting more for their money and businesses are cutting corporate budgets reducing the propensity to travel and the level of accommodation they stay in when they do so.

However, while a slowing of consumer spending will have inevitable consequences on the tourism industry it is too simple to assume that this will translate into a broad net reduction in industry activity. Evidence is showing us that despite consumers looking to make cutbacks holidays and breaks are seen as essential items and no longer a luxury, and there are areas such as a weak pound to euro exchange rate that are generating some unique opportunities for growth. The challenge for Tourism in Tyne & Wear is to maintain the momentum built by growth of the last 5 years by adapting to these new challenges presented by the current climate.

The section below provides an outline of the recent trends within the indicators used to track progress, and the research that has been carried to establish our strengths, weaknesses and opportunities for development.

Headline Economic Indicators

Latest figures suggest that in **2008** Tyne and Wear attracted over 39 million visitors that generated over 1.9 billion towards the sub regions economy. These numbers demonstrate a slight drop in output by the sector on 2007, a situation that was expected given the down turn in the global economy and its inevitable effects on discretionary consumer spending.

Visitor Impact in Tyne & Wear

	Staying visitor	Day visitor	All visitors
Visitor Numbers (m)	**3.09m**	**35.97m**	**39.07m**
Visitor Days (m)	**7.32m**	**35.97m**	**43.29m**
Spend (£m)	**£499.8**	**£1,477,000**	**£1,976,800**

The importance of Tyne and Wear to the North East Region

Tyne and Wear accounts for half of the region's £3.8 billion tourism expenditure, and approximately 50% of the day visitor activity.

	Staying visitor	Day visitor	All visitors
Visitor Numbers % of regional Total	**37%**	**50%**	**48%**
Visitor Days % of regional Total	**33%**	**50%**	**46%**
Spend (%) % of regional Total	**35%**	**62%**	**52%**

International Visitors

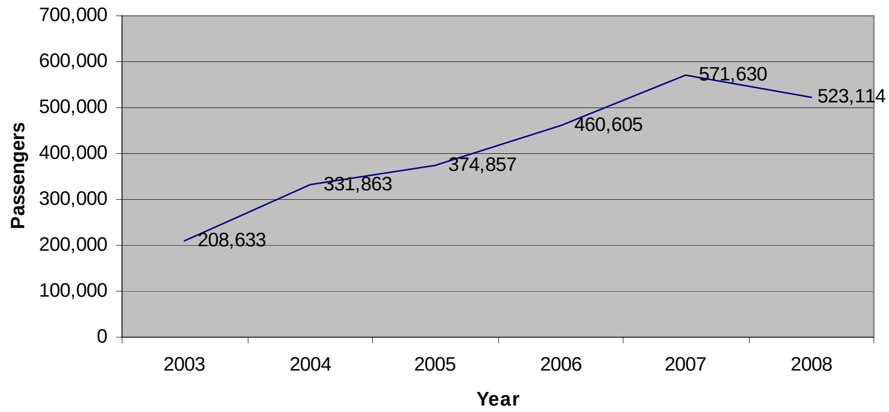
Headlines	2008
International flights into Newcastle Airport	**4,623**
International visitors arriving by air	**523,114**
International visitors arriving by Ferry	**40,674**

Visitors arriving by air

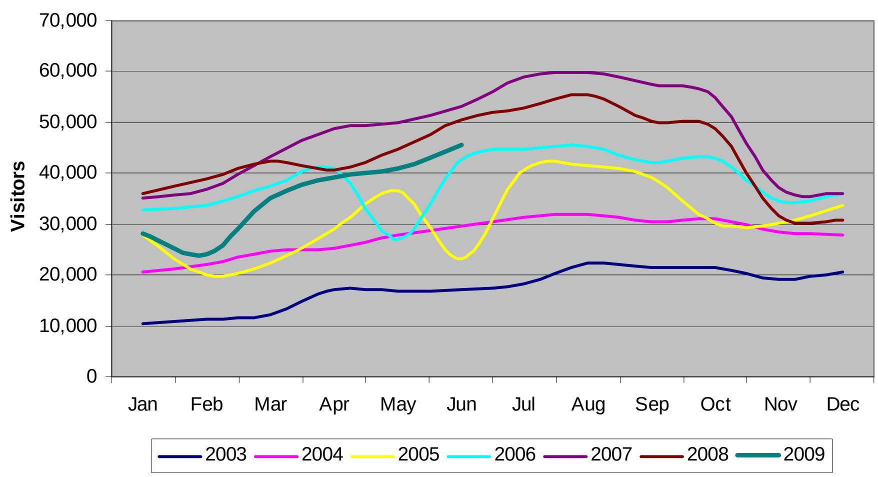
Tyne & Wear houses the two key international gateways into the region with Newcastle International Airport and the Port of Tyne. Due to the volume of traffic, the wide area that a regional airport such as Newcastle services and the many different reasons for travelling, monitoring inbound international leisure visitors by air can be problematic. The Civil Aviation Authority Survey is currently taking place throughout 2009 and will provide a better insight into the origin, nature and final destination of international visitors.

Until the results of CAA survey are published the numbers below give us a headline estimation of inbound international traffic into the region.

Visitors using Newcastle Airport



In bound visitors have continued to rise steadily between 2003 and 2007 as the airport, routes and destination have developed. 2008 saw the first signs of the growth slowing down when it dipped just below the 2007 mark by an estimated 48,516 travellers. This is not surprising given the onset of the recession, rise in fuel prices and the doubling of air passenger duty by government. However the decline in passengers was not restricted to Newcastle airport. Drops in air passengers were common place across the country with BAA reporting in the September a drop of 5% across all passenger figures.

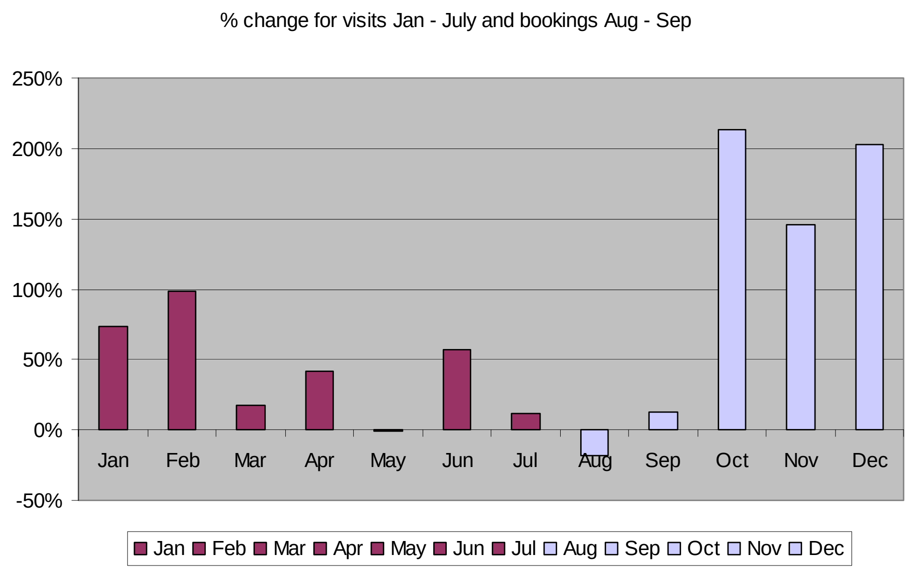


Passenger numbers for 2009 have continued to struggle on the back of 2008 with passengers for the first four months of 2009 dropping below those entering in 2006. However the second quarter of 2009 has picked up slightly and showing signs of steadier growth.

Visitors arriving by ferry

The majority of the 40,674 overseas visitors arriving by ferry are Dutch with around 10% travelling from Germany. These visitors are primarily travelling into Newcastle City Centre as part of either a one day visit or a two night visit staying in city centre hotels.

Overseas visitors arriving by ferry have shown far more positive trends in recent months than the airlines. The graph below illustrates the increase in Dutch and German visitors in 2009 compared to 2008 for the first half of 09 (Red bars) along with projections the rest of the year (blue bars).



February showed the most impressive performance with an increase in visitors on Feb 08 of 98% with advance bookings for October, November and December all up significantly on advance bookings from the same point in 2008.

Visitor Attractions

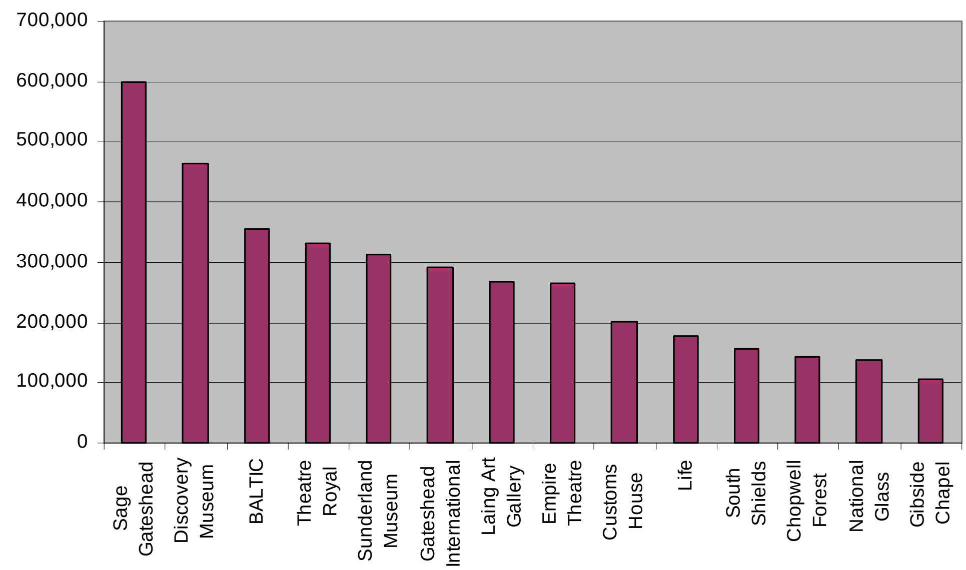
Performance of Attractions	2008
Visits to attractions	**3.8m**

Tyne & Wear attracts more visitors through the doors of its attractions than any other part of the North East, attracting 3.8m in 2008. The Sage Gateshead (600,000), the Discovery Museum (462,868) and the BALTIC (354,913) were the best attended attractions.

So far in in the first 6 months of 2009 a total of 1,979,211 visitors passed through the doors of Tyne & Wear attractions. The Discovery Museum attracted the most visitors with over 226,000 and the Sunderland Empire and the Museum and Winter Gardens both shown signs of significant growth. The Winter Gardens attracted 163,752 visitors which is up by 5% on the same period last year, while the Empires 163,788 visitors represented an increase of 55% on last years visitor numbers.

The addition of the recently opened Great North Museum is set to be a fantastic addition to Tyne & Wear's cultural offer, in its opening two months of May and June attracted a total of 174,994 visitors making it Tyne & Wear's second highest visited attraction, despite only being open for 5 weeks of a 6 month period.

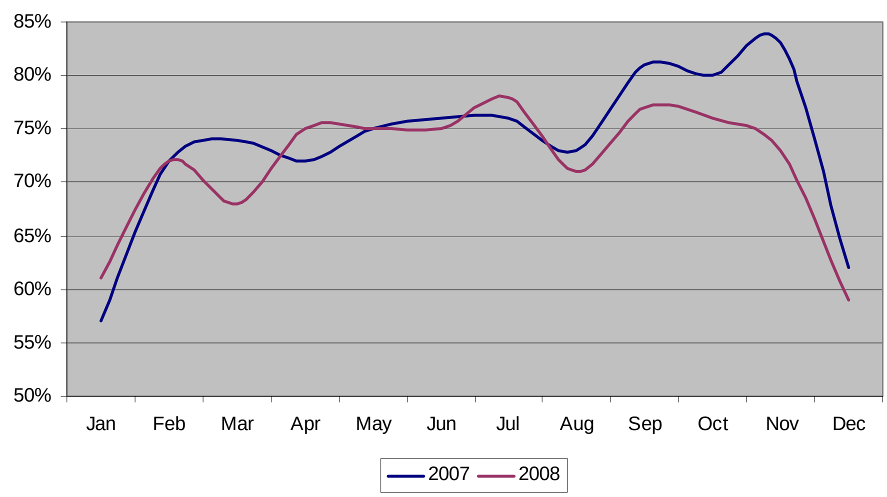
The table below illustrates the best visited attractions in Tyne & Wear in 2008



Hotel Occupancy

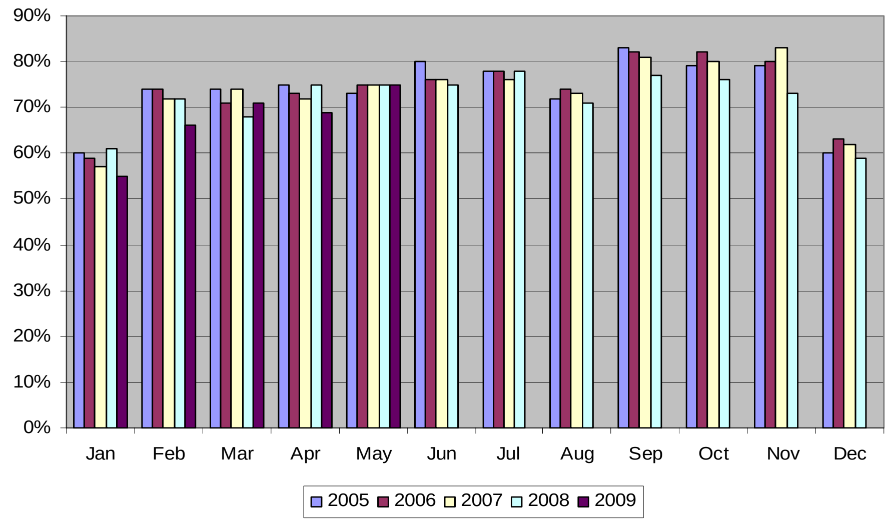
Headlines	**North East**	**Tyne & Wear**	**NewcastleGateshead City Centre**
Average annual occupancy rate 2008	**69%**	**72%**	**76%**

Hotel occupancy rates across Tyne & Wear struggled to maintain the level of previous years falling by 1 percentage point to 72% for the year of 2008. These results were heavily influenced by a drop in occupancy across the final 5 months of 2005, as illustrated below.



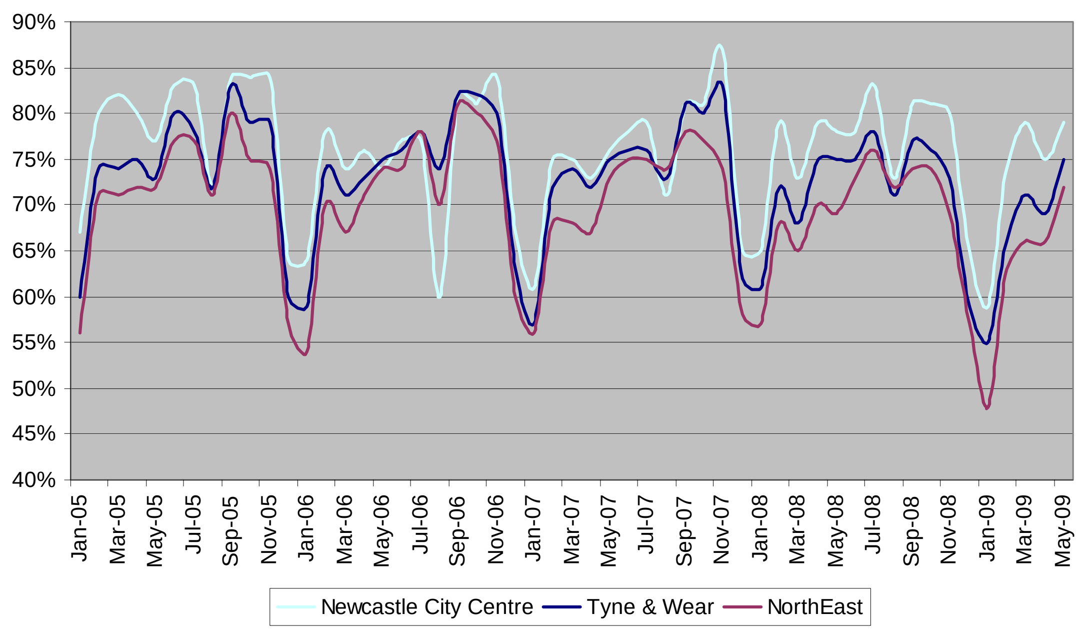
The sharp decline in average occupancy rates towards the end of 2008 runs very much inline with the decline in consumer spending and onset of the recession. Many Hotels are suggesting that the corporate and incentive markets were the major contributor to a decline in midweek occupancies with many businesses reassessing business travel policies, in favour of fewer journeys and better value accommodation.

The poor end to 2008 carried on into the beginning of 2009 where January and Februarys occupancies were the lowest for 5 years. There are however signs that performance may be beginning to improve with occupancy in March improving on the previous year for the first time in 7 months and May reaching the average level for May for the last 3 years.



Tyne & Wear within the North East

Tyne and Wear plays a major role in attracting visitors staying overnight in commercial accommodation. The graph below illustrates how Tyne and Wear has consistently maintained a higher average occupancy rate than the regional average for the past 4 ½ years.



Additionally as well as the Tyne and Wear occupancy levels pulling up the overall North East picture, occupancy rates for the Newcastle City Centre have been at a consistently higher level over the same four year period. To put this in context the average occupancy for the 4 year period in the North East was 70%, in Tyne & Wear it was 73% and in NewcastleGateshead City Centre it was 76%.

Changes in Accommodation Stock

Accommodation stock	2007	2008	% change
Serviced accommodation	**17,370**	**16,753**	**-3.5%**
Non serviced accommodation	**4,228**	**4,171**	**-1.3%**
Total	**21,598**	**20,924**	**-3.1%**

The decreases in accommodation stock have come about as an unfortunate consequence of the current economic climate. While consumers are more inclined to shop about for the best deals larger higher graded Hotels have reduced rates and provided offers that make it very difficult for many budget and lower graded accommodation to compete.

There are still plenty of new developments expected to come forward in the coming months to reverse this trend (highlighted in section 2.5) which are expected to come forward as the economic climate begins to improve.

Accommodation Development

To build on the information collected through the occupancy survey and develop our understanding of the issues and areas for potential development across Tyne & Wears accommodation markets, independent accommodation assessments have been carried out In NewcastleGateshead and Sunderland City Centres, Rural Gateshead and the coastal resorts of North Tyneside, South Tyneside and Sunderland.

The key messages from the studies include:

NewcastleGateshead

- Hotel supply has increased by 42.6% between 2002 and 2007, with the opening of 12 new hotels[1] and an additional 1,505 hotel bedrooms.
- City centre market remains very strong with room for growth in the 4* and boutique hotel markets.
- The corporate market is extremely important and is the primary source of midweek business.

Sunderland

- Current under supply of city centre accommodation coupled with the planned large scale office and retail developments provides the potential demand for future developments, including 3 star, upper budget, serviced apartments and possible scope for a boutique hotel in Sunniside.

Rural Gateshead

- Some market potential for the upgrading and possible expansion/development of existing hotels.
- Potential for some gradual additions of further B&B's, Guesthouses and touring caravans and camping in certain areas.

Tyne & Wear Coast

There is potential for a range of different types of accommodation development across the various coastal resorts including:

- The potential for a boutique hotel development, Guest house, B&B, pub and self-catering accommodation in Tynemouth.
- Potential market demand for home/ static caravan ownership and rental and touring caravanning and camping in North Tyneside.
- Scope for further budget hotel development and the expansion of home/ static caravan ownership and rental and touring caravanning and camping facilities within South Shields.

[1] Including two wholly serviced apartment residential blocks (Premier and City Apartments)

Business Tourism

As highlighted previously business tourism is an incredibly important sector within the visitor economy for both the region and in particular Tyne and Wear. It is less susceptible to seasonal variations than leisure visitors and is considered to be at the high quality, high yield end of the visitor spectrum in terms of revenue generated (North East Business Tourism Action Plan).

The regionally commissioned Business Tourism Report identified that:

- Business tourism in the North East represents 23% of all domestic trips and 32% of domestic tourism spending
- UKTS data shows that business tourism represents a greater percentage of overall trips and value than it does in any other region other than London and the West Midlands
- A PWC study claimed that the economic impact generated in 2004 by 52 conference venues in the NewcastleGateshead area was over £43 million

We recognise the importance of this sector to the Tyne and Wear Visitor Economy and are currently working with One NorthEast on a piece of research to develop a true understanding of the volume and value of Business Tourism to Tyne & Wear, the potential markets that can be targeted to increase this and a model that will let us monitor progress year on year.

Visitor Satisfaction

Visitor Satisfaction is monitored through the Regional Visitor Survey. The latest survey carried out across 2008 provided an update on the survey carried out in 2006. In this time there has been considerable improvement in the satisfaction of visitors to Tyne & Wear.

All visitors	**2006**	**2008**	**Change**
Bars and restaurants	85%	93%	**+8%**
Visitor attractions	85%	93%	**+6%**
Quality of shopping	85%	92%	**+5%**

Overnight Visitors	**2006**	**2008**	**Change**
Accommodation	79%	94%	**+17%**
Bars and restaurants	89%	93%	**+15%**
Visitor attractions	88%	98%	**+13%**
Quality of shopping	88%	93%	**+9%**

Overseas visitors	**2006**	**2008**	**Change**
Accommodation	78%	95%	**+17%**
Bars and restaurants	83%	98%	**+15%**
Visitor attractions	79%	92%	**+13%**
Quality of shopping	85%	94%	**+9%**

2.4 The Tourism Offer: Products and Experiences

2.4.1 Product Evaluation

The main components of Tyne and Wear's tourism offer are:

- **Retail** – Tyne and Wear has two of the biggest shopping centres in Europe (Eldon Square / Northumberland Street, and MetroCentre) complemented by a range of smaller, independent boutiques. Sunderland has The Bridges and the emerging Sunniside 'designer / independent boutique' area, and North Tyneside has the popular discount shopping experience at Royal Quays.
- **Nightlife** – Tyne and Wear's nightlife is a key attraction, with a number of clusters of bars and clubs – e.g. the Quayside, Bigg Market, The Gate, Sunderland City Centre, Jesmond and Whitley Bay.
- **Events** – Tyne and Wear has a strong events offer that includes the culture[10] programme, the BUPA Great North Run, Evolution Festival, the Mouth of the Tyne Festival, and the Sunderland International Air Show.
- **Coast** – The Tyne and Wear coastline is the most popular in the North East and forms a large proportion of our day visitor market. There are there blue flag beaches and watersports are becoming an increasingly important element of our visitor economy. The proximity of the coast to the cities and the connectivity offered via the Metro system makes the area unique, especially Sunderland – a city by the sea. The sub-region's coast provides a dramatic backdrop to events.
- **Culture** – This is a strong feature of Tyne and Wear's offer. Visual arts assets include the BALTIC Centre for Contemporary Art, the Laing Art Gallery, the Shipley Art Gallery, the Biscuit Factory, the National Glass Centre, the Northern Gallery for Contemporary Art and a number of other galleries and studios and public art (e.g. the Angel of the North). Performing arts venues include The Sage Gateshead, the Theatre Royal, Northern Stage, Live Theatre, Sunderland Empire, Customs House, Whitley Bay Playhouse and the MetroRadio Newcastle Arena. North Tyneside are also including an art space in the £60m redevelopment at Whitley Bay within the Spanish City development.
- **Museums** – The area's museums attract more than 1 million people a year. They include the Great North Museum, Discovery Museum, Sunderland Museum and Winter Gardens, Centre for Life, South Shields Museum and the Stephenson Railway Museum.
- **History, heritage, and the built environment** – Tyne and Wear has significant heritage sites and a visible legacy that stretches back more than 2000 years. These include the Roman World Heritage Site of Hadrian's Wall and its associated forts, museums, national trail and cycle path., The twin Anglo-Saxon monasteries of St Peter's and St Paul's, the 'Wearmouth-Jarrow' UK World Heritage nomination for 2010; Tynemouth Priory and Castle; Washington Old Hall; Sunniside the historical heart of Sunderland; Souter Lighthouse; Grainger Town in Newcastle; and the Gibside Estate.
- **Sport** – The sub-region is home to two major football clubs that generate significant visitor activity. Other sporting venues include the Newcastle Racecourse, Gateshead International Stadium, Kingston Park, Sunderland Aquatic Centre, the region's only 50m pool at the developing Stadium Park, and a host of watersports and leisure activity around the coast and marina.
- **Natural heritage** – Although a mainly urban destination, Tyne and Wear can offer pockets of natural heritage, including the coast (parts of which are significant in terms of geology and wildlife) and parks and green spaces such as Washington Wetlands Centre, Chopwell Woods, Herrington Country Park, Mowbray Park, Saltwell Park and Leazes Park. Gateshead in particular boast an excellent rural offering and the reintroduction of red kites into the area two years ago has provided a important new addition to our product.
- **Conference venues** – As the region's main commercial centre, business tourism is a significant generator of visitors. The sub-region has a range of conference venues that include city centre hotels, The Sage Gateshead and other unusual and sporting venues such as Life Science Centre, St James Park and the Stadium of Light.
- **Universities** - The three universities play a key role in the visitor economy by not only adding vibrancy to our cities but also by attracting visits, especially in the VFR market, to the area.

<table>
<tr>
<td>Strengths

Strong product offer as outlined above.
Since 2000, NewcastleGateshead Initiative (NGI) actively promoting tourism and has high levels of engagement (financial and practical) with the private sector. NGI has helped grow a significant business tourism market, working through its convention bureau and ambassadors scheme.
All five Local Authorities have a strong commitment to the development of tourism.
Numerous national and international press trips into both NewcastleGateshead and to attractions throughout Tyne and Wear to help change perceptions of the area.
The three coastal authorities have worked together on a coastal regeneration strategy.
The Wearmouth Jarrow World Heritage Site Nomination will shine a spotlight on the area in 2010 and beyond whilst the international recognised Hadrian's Wall country is continuing reason to visit.
The Area Tourism Partnership has been in operation for two and a half years and has improved communications and developed new opportunities for Tourism businesses.
The Tyne and Wear Attractions Forum meets quarterly and the Discover pass promotes special offers at over 40 Tyne and Wear attractions.
The welcome / people of Tyne and Wear is often highlighted by visitors.
</td>
<td>Weaknesses

Poor co-ordination of product offer across Tyne and Wear and beyond - manifesting itself in the multiple production of visitor guides, print and information.
Insufficient resources and intelligence to effectively target overseas markets.
Limited e-business activity in tourism.
Transport gateways, signage and visitor orientation need improving.
Product deficiencies around the evening offer and opening hours.
Skills and recruitment challenges.
Need for further capital investment in the visitor economy infrastructure of the area, in particular in Sunderland and North Tyneside and South Tyneside.
The lack of a major convention centre and exhibition spaces is limiting the business tourism market and our competitive advantage with other city regions.
The lack of city centre hotels in Sunderland.
The need for larger 4 star and high quality accommodation in central NewcastleGateshead have been identified as gaps.
</td>
</tr>
<tr>
<td>Opportunities

Potential to grow the business tourism sector
The Newcastle and Sunderland Legible Cities projects have the potential to transform the visitor journey.
Much work done in product development particularly in terms of city based cultural attractions, heritage and cycle networks and coast and countryside activity.
The development of the transport infrastructure, airport route development and £300 million metro reinvigoration.
The expansion of the retail offer.
The growing body of tourism research regionally and sub regionally based on NewcastleGateshead has helped focus energies on key markets and developments.
The economic impact of the emerging Cruise Tourism opportunities
</td>
<td>Threats

External threats on visitor spending e.g. credit crunch
Losing in bound transport routes e.g. DFDS Norway Route
Long term sustainability of regional tourism funding
Local political sensitivities over ridding business need.
Too many organisations offering opportunities / support to businesses.
Reduced funding for festivals, events and marketing.
</td>
</tr>
</table>

• Possibility of the reintroduction of a Norwegian Ferry Route • The NewcastleGateshead City Development Company, 1NG, will deliver major capital investments into the area e.g Conference Centre. • Working with Newcastle's Business Improvement District to agree visitor focused investment in the City Centre • An upcoming decade of sport. Starting with the 2012 Olympic Games, the 2013 Ashes series and the Test Match at Durham, the 2015 Rugby World Cup and the potential host city status for Sunderland and NewcastleGateshead for the FIFA World Cup in 2018 or 2022.	

2.4.2 Key Themes and Experiences to Market

We hope to update this section when the 2008 Regional Marketing Framework Review is published – Awaiting timescales from ONE NorthEast .

From our research we know that people are attracted to visit Tyne and Wear by the shops, restaurants, bars and nightlife, as well as by the cultural facilities. There are a number of key experiences that the sub-region can offer its different target markets:

Primary experiences	Target Markets
City short breaks with focus on nightlife, sport, and shopping	UK/Ireland based on low-cost air routes and from North West, Yorkshire and Scotland, aged 20-30, couples and groups of friends
City short breaks with a focus on arts, events/festival and heritage	UK/Ireland based on low-cost air routes; and from North West, Yorkshire and Scotland, aged 35 + Visiting Friends and Relatives (VFR)
Day visits to the city, coast and countryside	Families, couples and groups of friends living in the North East Families and couples on holiday elsewhere in the region Retail day visitors and group travel
Association and corporate conferences	UK and international

2.5 The Tourism Offer: Major Tourism Investments in Progress

The key planks of current capital investment plans include:

Coastal regeneration – North Tyneside has significant plans to develop a "cultural coast" including private sector investment at key sites around Tynemouth Longsands, the refurbishment of the iconic Spanish City Dome and development of Whitley Bay Playhouse which is due to open in September and will be run by SMG events who also run Newcastle Arena. The North Shields Fish Quay has been identified regionally as a key regeneration area.

In South Tyneside, significant foreshore regeneration is underway including the recent completion of £5.3m development of South Marine Park, and the Dunes, an indoor entertainment complex accompanying Ocean Beach Pleasure Park. Plans are also in place for improvements on the promenade and coastal defence infrastructure. Sunderland's Seafront regeneration strategy will outline planned infrastructure improvements.

Attractions Investment - The Great North Museum is a key new attraction of national importance that opened in 2009. The Centre for Life has recently benefitted from a £3 million refit and links into the development of the Science City Project that has wider tourism and regeneration aims. The Ouseburn Barrage project is due to be completed in September that will look to breathe extra life into the Ouseburn Valley. Over the river in Gateshead the New Heritage Centre at St Marys church opened its doors to visitors in November 2008.

In Sunderland Down at the Farm opened in 2007 and provided a new outdoor visitor attraction. The Sunderland Aquatic Centre opened April 2008, the only 50m pool in the North East which together with the Stadium of Light forms the basis of Stadium Park. Single Programme funding has been approved to develop Herrington Country Park into an outdoor events arena. Monkwearmouth Station Museum recently reopened after considerable redevelopment. In South Shields the Museum and Art Gallery is undergoing redevelopment to create more gallery space and a new café whilst the Customs House has been refurbished and improved the visitor experience.

Transport improvements -The expansion of visitor facilities at the airport and £300 million improvement of the Metro and the completion of a new cruise terminal at the Port of Tyne are important investments in the visitor economy. Route development includes the introduction of the Emirates Dubai route and the Grand Central Sunderland – Kings Cross rail link.

Development of International Conference and Exhibition Centre - 1NG, the city development company for NewcastleGateshead, identified the ICEC as a strategic priority project. An initial study from a team led by KPMG concluded that a market does exist for an ICEC in the north east region, that the most appropriate location is NewcastleGateshead and that the site to be pursued in more detail is Gateshead Quays. A follow-on report is now being undertaken by a KPMG-led team to assess three things: (1) the Business Plan for an ICEC in close proximity to the Sage Gateshead (2) the economic benefits to be derived from an ICEC in Gateshead Quays and (3) the possible physical manifestation of an ICEC. The team are due to report back by November 2009, at which point the partners will need to review the viability of the ICEC with detailed consideration of the benefits to be gained from substantial public sector investment.

Hotel investment - Our accommodation stocks continue to grow. Recent developments include:

Hotel	Standard	New Rooms
Recently opened		
Hotel du Vin, Newcastle	Boutique	42
Kensington ApartHotel, Newcastle	Boutique	10
Staybridge Suites, Newcastle	Aparthotel	130
Premier Inn Newcastle Holystone, North Tyneside	Budget	30

Hawksley House, Sunderland	Aparthotel	17
Mowbray Park Apartments, Sunderland	Aparthotel	40
Best Western Roker Hotel, Sunderland, complete redevelopment	3 star boutique	57
Due to open in 2009/10		
Newcastle Airport Hotel	4 star	187
Premier Inn, Derwenthaugh - extension	Budget	30
Jury’s – Gateshead Quays	3 Star	200
Saints Newcastle	Deluxe Boutique	10
Future Developments/Proposals		
Travelodge, Newcastle (2011)	Budget	167
Holiday Inn Newburn Riverside, Newcastle	3 star	155
Express by Holiday Inn, Gateshead	Upper-tier Budget	202
Travelodge - extension, North Tyneside	Budget	81
Sleeperz, Newcastle	Budget (Boutique)	95
Crowne Plaza, Newcastle	4 star	250
Downing Plaza	4 star	198
Gateshead Quays 2	4 star	230
Gateshead Quays 2	Budget	180
Racecourse	Budget	35
Clayton Street. Newcastle	3 star	70
The Point, Gateshead	4 star/boutique	120

3. Tyne and Wear Priorities and Projects

3.1.1 Priorities for Tyne and Wear

We propose these strategic priorities to achieve the potential of our visitor economy:

1. **The development of business tourism**
2. **Delivering a world class events programme**
3. **Increasing the online visibility and capacity of tourism businesses**
4. **Enabling coastal regeneration**
5. **Transforming the provision of visitor information**
6. **Improving the quality of the tourism product**
7. **Delivering effective marketing**
8. **Providing great attractions and new reasons to visit**
9. **Strengthening tourism partnerships**

1. The development of business tourism

Context: The development of a Convention Centre / Exhibition space is a high priority as is the development of larger hotels and the support services to respond. Marketing to conference / event organisers should be increased and information provision should ensure an accessible and easy visit and try to ensure that the business visitor returns as a leisure one. This priority is not just about creating the business tourism environment; this must translate to delegates on seats and in beds i.e. actual business for our conference and event venues.

2. Delivering a world class events programme

Context: We recognise that events are key drivers for visitors and therefore important to other aspects of the visitor economy such as hotel occupancy and spend. There is already an impressive amount of activity occurring within Tyne and Wear and we need to ensure that current levels of activity are maintained to continue to develop the 365 day offering for visitors and local audiences. Additionally and more importantly, iconic, world class events need to continue to be sought and developed to shine a spotlight on the area, change perception and generate increased visitors.

3. Increasing the online visibility and capacity of tourism businesses

Context: There is a need to up skill and develop Tyne and Wear's Tourism SMEs to enable them to compete in market place. We need to ensure that Tyne and Wear businesses are able to do this from the coastal B & B's to the larger hotels who operate within their chains but are not yet aligned or coordinated with the rest of the Tyne and Wear product. We need to ensure that the development of Desti.ne supports our businesses and that our e strategies deliver them business.

4. Priority: Enabling coastal regeneration

Context: The Tyne and Wear coast is changing and several large scale development schemes will mean that our neglected coastline will be regenerated for residents and for visitors. We need to concentrate on those projects that will have significant impact on the visitor economy and provide iconic attractions or reasons to visit that will boost visitor numbers, especially those staying overnight.

5. Transforming the provision of visitor information

Context: This is not just about Tourist Information Centres, this is about looking at the points of contact in a visitor's journey and establishing the mode and method of information at these points. The Tyne and Wear Legible Cities projects (including NewcastleGateshead and Sunderland) highlight the areas for development. These projects will improve the visitor experience and provide dispersal information in order to spread their spend across Tyne and Wear and the North East.

6. Improving the quality of the tourism product

Context: It is important that this doesn't become a catch-all priority that any project could fall under. By this we mean addressing the quality of the visitor experience with the tourism product in Tyne and Wear. This means looking at the skills and training requirements of our workforce. Adapting, developing and encouraging participation in quality assurance schemes that have meaning to visitors and benefit businesses and supporting businesses to develop and invest in themselves so that the quality of our accommodation, food and drink and attractions speak for themselves. We need to focus on our gateways and ensure that the welcome visitors receive is appropriate and high quality.

7. Delivering effective marketing

Context: We need to develop a marketing plan that delivers trade to our tourism businesses, that is evidenced based and customer focussed. We need to add value and maximise the potential of partners own marketing including at a regional level. We need to target high yields markets and remember that this includes both volume and value. Legible Cities highlighted a range of third parties who could deliver our marketing for us. We must target them to help us deliver. We must continually improve our online presence.

8. Providing great attractions and reasons to visit

Context: There are already some great reasons to visit Tyne and Wear and these need to be developed to maximise their potential. At the same time, the gaps in the product should be addressed and we should always be looking for projects that set Tyne and Wear apart from other destinations. The Wearmouth-Jarrow World Heritage Site bid offers an opportunity for the North East to gain a third World Heritage Site. We need to ensure that future developments have strategic fit and can demonstrate need. We also know how important the retail sector is to the visitor economy and recognise the link between new investment in this area and increasing visitor spend.

Additionally: Although we see the previous eight priority themes as crucial to growing the visitor economy in Tyne and Wear as whole, it is also important to recognise the priorities and role of the Area Tourism Partnership as the strategic lead for the sector and the body that develops and manages the ATMaP. It includes the delivery of the day to day, bread and butter tasks that ensure strong research is collected and used appropriately, businesses are communicated with, product records are updated and enquiries are dealt with. The strength of this partnership is paramount to the delivery against any of the priorities outlined above.

9. Strengthening tourism partnerships

Context: The Area Tourism Partnership (ATP) has been in operation for since January 2007. During this time and with the benefit of hind sight, we have become clearer on the challenges the sector faces and the action / intervention required. This is not about keeping the status quo, it's about providing leadership, coordination and focus to ensure a growth in the visitor economy and an improvement in the visitor experience.

3.1.2 Local Destination Management Plans

Sunderland

Sunderland is committed to the production of a destination management plan. The city currently lacks hotel stock and other basic seven day a week tourism infrastructure. Its ambition over the next 10 years is to develop a distinctive tourism offer based on events, attractions and heritage. The city will build a new bridge, expand its sporting facilities and develop Herrington County Park as the region's premier outdoor events venue. Its regeneration will see a doubling of hotel stock and the refurbishment of its station. Its visitor profile will move from day visitors and VFR to grow a new layer of staying visitors attracted by its heritage, sporting facilities and business offer.

Wearmouth-Jarrow World Heritage Site

The Wearmouth–Jarrow Partnership is tasked with producing an overarching Destination Management Plan setting out why the site is internationally important, how it will be looked after and how people can visit and learn about its immense legacy. Achieving World Heritage Site status will raise the profile of the South Tyneside, Sunderland and the North East region by attracting more people to visit, enjoy and learn – continuing its legacy of 13 Centuries. Potentially Wearmouth-Jarrow will be the third World Heritage Site in the North East and a key piece of the regional tourism jigsaw. Approval in 2011 would not only preserve an important piece of history but act as a catalyst for growth for the destinations around it.

Future destination development in rural Gateshead may be developed following the publication of the Derwent Valley Feasibility study. It is also important to note that part of Hadrian's Wall Corridor Destination Management Plan covers Tyne and Wear and highlights key developments around Segedunum and Arbeia.

3.1.3 Priority Projects

The Tourism Tyne & Wear Partnership Board assessed the ATMaP in September 2008 and identified the following projects and work areas as a priority for Tyne and Wear over the next three years:

- Convention Centre / Events Space in NewcastleGateshead
- Wearmouth-Jarrow World Heritage Site
- Development of visitor focussed Coastal Infrastructure
- Legible Cities Projects

3.2 Priorities for Tyne and Wear

The following table sets out the broad actions and key projects undertaken by Tourism Tyne & Wear, its partners and businesses over the short to medium term. There are also a considerable number of longer term capital projects that are in the planning stages which are highlighted in the **Capital Projects Tracker** in **Appendix 2**.

The project prioritisation process, if required by One North East or other funders is outlined in section 4.3.

The table covers 2008 – 2011. The Timescale column identifies the length of the project.

The related objectives highlighted in bold identify the key objectives for Tyne and Wear as well as the region.

Key: **TTW** – Tourism Tyne & Wear, **LA** – Local Authority, **ONE** – One NorthEast, **1NG** – 1 NewcastleGateshead (City Development Company), **HLF** – Heritage Lottery Fund, **HWH –** Hadrian's Wall Heritage

1. The Development of Business Tourism							
Projects 2008 -11	**Priority**	**Timescale**	**Related Objectives**	**Indicative cost**	**Lead**	**Support**	**Notes (status)**
Support the development of a International Conference and Exhibition Centre.		2008 onwards. Development in next five years	**1**,**2**,3,**4**,5,6,7,**9**	£80m – £120m depending on chosen project	1NG	Partners inc ONE, LA, Private Sector, TTW	An initial study from a team led by KPMG concludes a market does exist within NewcastleGateshead and that the site at Gateshead Quays should be pursued in more detail.
Ensure co-ordinated business tourism and conference marketing, PR and sales activity		Ongoing	**1**,**2**,3,5		NGI	Businesses, TTW, LA, other ATPs	Also a key priority for Marketing and Communications
Manage the development of bespoke business tourism online and IT systems to maximise sales and marketing activity and ensure the destination can compete on an international stage.		Ongoing	**2**,3,**9**		NGI	Businesses, TTW, ONE, LA	Chaser CRM system implemented. Ongoing development of business tourism website requires further development.

Support the sustainable development of major conference infrastructure projects e.g. large hotels in line with hotel study recommendations.		Ongoing	**1,2**,3,**4**,5,6,7,**9**		Private Sector	TTW, NGI LA	Hotel study delivered April 2008. Hotel development outlined in Appendix 2.
Develop Conference Ambassador programme with focus on key RES and Science City sectors		Ongoing	**1,2,3,**		NGI	Universities, Private Sector, TTW	Needs long term focussed resource to deliver.

2. Delivering a world class events programme

Projects 2008 -11	Priority	Timescale	Related Objectives	Indicative cost	Lead	Support	Notes (status)
The development of a new festival and events strategy for Tyne and Wear and the prioritisation of key 'attractor' events for regional funding.		Strategy due Autumn 2009 – Events programme delivered 2010 onwards	**1,2**,3,**4**,7,**9**		NGI, LA	TTW, Private Sector	
The Dome Arts and Cultural Centre, Whitley Bay.		2008-10	**1,2**,10	£4.5m	North Tyneside Council	Private Sector Developer	Renovation works nearly completed. Also key priority for coastal regeneration.
Gateshead International Stadium		2008-2011	**1,2**,3,**4**,7,10	£10m	Gateshead Council	ONE, Olympic partners	Business Plan prepared. Costs finalised. Outline design (RIBA Stage C) complete. Work progressing to Stage D. Business Case to be submitted to ONE in September. Important part of Olympic planning for the region.

3. Increasing the online visibility and capacity of tourism businesses							
Projects 2008 -11	**Priority**	**Timescale**	**Related Objectives**	**Indicative cost**	**Lead**	**Support**	**Notes (status)**
Ensure the benefits of Desti.ne are communicated to businesses so that they understand the benefits of selling on line and single point data entry		Ongoing	**1**,**2**,3,**9**		TTW	Businesses, ONE, LA	
Develop and provide training to up skill Tyne and Wear businesses online and IT capabilities		Ongoing	**9**		TTW	LA, ONE NGI	
Manage and develop digital/e-marketing strategies to boost the presence of Tyne and Wear destinations and businesses		Ongoing	**1,2,9**		TTW,NGI	LA, ONE	

4. Enabling Coastal Regeneration							
Projects 2008 -11	**Priority**	**Timescale**	**Related Objectives**	**Indicative cost**	**Lead**	**Support**	**Notes (status)**
Mapping and promoting coastal product to potential visitors.		Ongoing	**1**,**2**,3,**9**		LA, TTW	Businesses, ONE	Also a key priority for strengthen tourism partnerships
Development of Strategic Sites around Tynemouth Longsands. Could include regional surf / watersports centre		2009 onwards. 5-10 year project.	**1**,**2**,3,**4**,6,7,**9**,10	£6 – 10 m	Private Sector	North Tyneside Council	Discussions with potential developers underway. Consultants appointed for coastal master planning.
Multi-functional artificial reef		2008 - 2112	**1,2,3**,7,**9**,10	£3m	North Tyneside	Newcastle University,	Initial feasibility study complete, funding

					Council	Private Sector, Natural England	search underway. Also key priority for Providing Great Attractions and new reasons to visit
Improvements to the promenade – Tynemouth to Whitley Bay		*2008 - 2012*	7,**9,**10	Unknown	North Tyneside Council		Included as part of Sea Change bid
Tynemouth Station		2008 – 2010	**2**,3,7,10	£3.5m (est)	North Tyneside Council	ONE, English Heritage	Included as part of Sea Change bid. Also key priority for Providing Great Attractions and new reasons to visit
Seafront Regeneration – Roker and Seaburn		2009 – 2010 for strategy development	7,**9**,10	£200k for strategy and £1.5m for public realm improvements	Sunderland City Council		Regen Strategy emerging and bid to be submitted to Sea Change fund.
Cultural Quarter Maritime Museum and Arrivals Lounge		2009 - 2011	7,**9**,10	£10 m	Sunderland City Council	ONE, HLF and University of Sunderland	Project Development underway
Foreshore Development - promenade and sea defence improvements	Key priority for ST Council	2009 onwards	**1**,**2**,3,**4**,6,**9**,10	£4m (£1m ST Council - £1m Sea Change - £2m Sea Defence)	South Tyneside Council	Sea Change Defra	Foreshore master plan produced
Foreshore Development - Pier Parade Leisure Space – Waterpark	Key priority for ST Council	Provisional opening July 2011	**1**,**2**,3,**4**,6,**9**,10	£15m approx	South Tyneside Council		Project at feasibility stage. Site acquired and design being progressed.
Ocean Beach redevelopment		Phase 1 complete 2007 - 2010	**1**,**2**,3,**4**,7,**9**	£5m	Private Sector Operator		Provides all weather complex
South Shields Riverside inc hotel, heritage, park development		2008 onwards until 2019	**4**,6,7,10	£300 m approx	South Tyneside Council	ONE, private sector, HWH	Phased development programme

5. Transforming the provision of visitor information							
Projects 2008 -11	**Priority**	**Timescale**	**Related Objectives**	**Indicative cost**	**Lead**	**Support**	**Notes (status)**
Ensure Legible City principles are incorporated into tourism development projects.		Ongoing	**2**,**9**,10		TTW	Businesses, ONE, LA esp. Sunderland, Newcastle and Gateshead, HWH	Ongoing
NewcastleGateshead Walk Ride – development of the 8th Bridge.		2009 - 2011	**2**,**9**,10	£2.5 million	Newcastle City Council Gateshead Council	1NG, TTW, NGI, ONE and part of Business Improvement District planning	Exploring funding options as part of wider Tyne and Wear project
Sunderland Legible City project. Includes Gateway Improvements linked to Central Station.		2008 – 2010	**2**,**9**,10	Phase 1 - £30k Full project cost £2.2M	Sunderland City Council	ONE, TTW	Consultants study completed. Developing plans to take forward.
Manage the roll out of Desti.ne ensuring businesses in Tyne and Wear participate and it is populated with good content on Tyne and Wear destinations		Ongoing	**1**,**2**,3,**9**		TTW	ONE, LA	
Manage distribution of appropriate visitor information including CRM strategy.		Ongoing	**1**,**2**,3,**9**		TTW	LA, Private Sector	
Ensure that visitor information provision develops in line with customer needs		Ongoing	**1**,**2**,3,7,**9**		LA	TTW	

6. Improving the quality of the tourism product							
Projects 2008 -11	**Priority**	**Timescale**	**Related Objectives**	**Indicative cost**	**Lead**	**Support**	**Notes (status)**
Provide and signpost appropriate business support and training for tourism businesses (skills, training, investment, development, sustainability)		Ongoing	**4**,5,7,8,**9**		TTW	LA, Training Providers, Business Link, ONE, People 1st	Also a key priority for strengthen tourism partnerships
Develop skills and address increasing recruiting difficulties in the industry.		Ongoing	**4**,5,7,8,**9**		TTW	Training providers	Also a key priority for strengthen tourism partnerships
Encourage more businesses (accommodation and attractions) to participate in national quality assessment schemes. Develop new criteria or existing schemes to provide quality benchmark for other sectors.		Ongoing	5,7,8,**9**		TTW	NGI and LA	Also a key priority for strengthen tourism partnerships
Identify gaps and improvements that could be made to the welcome into Tyne and Wear at transport gateways		Ongoing	7,8,**9**		TTW	Newcastle Airport, Port of Tyne, DFDS	Airport and Port studies both completed. Action plans being delivered.
Identify opportunities for improvements in transport infrastructure through collaboration with transport operators		Ongoing	**1**,3,**4**,6		Transport Operators	TTW, Highways Agency, LA	Metro reinvigoration is a key priority. Legible Cites will also address this.
Develop evidence base for increased tourism skills and training provision.		Ongoing	6,7,8,**9**		TTW	LA, Training Providers, Business Link, ONE, People 1st	
Cruise Tourism – address the welcome given to cruise passengers arriving at the Port of Tyne		Ongoing	**1,2,4,9**		TTW / ONE	LA	Regional Wide Project
Legible Cities – to improve the user experience of the sub region		2008 onwards	**2**,7,**9**		TTW, LAs	Transport Operators, ONE, 1NG, HWH	There is an overall Tyne and Wear framework and individual projects to be delivered by

							Newcastle, Gateshead and Sunderland Councils.

7. Delivering effective marketing							
Projects 2008 -11	**Priority**	**Timescale**	**Related Objectives**	**Indicative cost**	**Lead**	**Support**	**Notes (status)**
Coordinate research and provide an evidence base to enable visitor focussed planning		Ongoing	**1,2**		TTW	NGI,LA,ONE,HWH	Also a key priority for strengthen tourism partnerships
Coordinate and deliver annual marketing and communications plan.		Ongoing	**1,2**,3,**9**		TTW	NGI, LA, ONE, HWH	Also a key priority for strengthen tourism partnerships
Work with private sector partners to deliver robust marketing campaigns		Ongoing	**1,2**,3,**9**		TTW	NGI, Private Sector, LA, HWH	Also a key priority for strengthen tourism partnerships
Ensure marketing undertaken by the partners is integrated and complementary wherever appropriate.		Ongoing	**1,2**		TTW	NGI, LA, ONE, Private Sector, HWH	Also a key priority for strengthen tourism partnerships
Ensure a co-ordinated Tyne and Wear input to regional, national and international marketing		Ongoing	**1,2**		TTW	NGI, ONE, LA,HWH	Also a key priority for strengthen tourism partnerships
Ensure Desti.ne information collection plan is delivered and the system is populated with good content on Tyne and Wear destinations / product		Ongoing	**1**,5,7,**9**		TTW	Private Sector, ONE, LA	Also a key priority for strengthen tourism partnerships

Develop visitor focused websites for Tyne and Wear product to support visitor information and specific campaigns		Ongoing	**1**,**2**,3,**9**		TTW, LA	Private Sector	Also a key priority for strengthen tourism partnerships and online visability
Legible Cities – work with third party information providers in line with T&W framework		Ongoing	**1,2,9**		TTW, LA	Private Sector, HWH	Also a key priority for strengthen tourism partnerships

8. Providing great attractions and reasons to visit							
Projects 2008 -11	**Priority**	**Timescale**	**Related Objectives**	**Indicative cost**	**Lead**	**Support**	**Notes (status)**
Advise on investment in tourism and exert influence on investment decisions by acting as a broker/champion to win the backing of other agencies and funding		Ongoing	6		TTW	Partners, funding agencies inc ONE	Also a key priority for strengthen tourism partnerships
Support product development by sustaining and improving existing attractions of regional and sub-regional significance.		Ongoing	**2**, 3,7,**9**,10		Attraction operators	TTW, LA , NGI	Also a key priority for strengthen tourism partnerships
Develop, extend and support the evening economy		Ongoing	**1**,**2**,3,**4**,,5,6,7,8,**9**		Businesses	TTW , LA	Looking at existing quality schemes for bars and restaurants. Possible Forum developing
Discover – the ongoing development of a special offer pass for attractions		2008 -2011	**2**,3,**9**		TTW, Attractions	LA	Also a key priority for Marketing and Communications
Delivery of Tyne and Wear Attractions Forum		Ongoing	7,8		TTW	Attractions, LA	Also a key priority for strengthen tourism partnerships
'Heart of the City' cluster of		HLF bid	**1**,**2**,10	£4.75 m bid to	Heart of the	1NG,	Partnership

attractions		currently being restructured		HLF	City Partnership	Newcastle City Council, HWH	formalised as company Sept 07
Eldon Square Developments		Feb 2010	**2,3,4,5**	£180m	Capital Shopping and Newcastle City Council.	Private Sector	Will provide 28,000 square metre of retail space.
Waygood Gallery		2009	**1,2,4**	£4.1m	Newcastle City Council	ONE, Arts Council	Will include 30 artist units
Wearmouth-Jarrow, World Heritage Site		2011	**1,2**,3,**4**,7,**9**,10	Phase 1 £600k Phase 2 £500k	Sunderland and South Tyneside Councils, WHS Management Group	ONE, TTW	WHS decision expect 2011 following submission to UNESCO in 2010
Arbeia Roman Fort		2009 onwards 5-10 year project	**1,2,4,9,**10	£6 – 10 m	South Tyneside Council and HWH	Tyne and Wear Museums	Feasibility Study completed. Project will only proceed as part of wider Hadrian's Wall development. Also a priority for enabling coastal regeneration.
Souter Lighthouse and the Leas Improvements to the shop and interpretation of site mainly through improved interpretation boards along the Leas and around the lighthouse. Feasibility study planned 2009-10. 2010-11 work planned.		2009 - 2011	**2**,7,**9**,10	Bid to National Trust central funds	National Trust		
Angel of the North –Infrastructure Development		2008-10	7,**9**,10	Unknown	Gateshead Council		10-year celebrations 2008 Coach & Car park complete. Exploring additional funding opportunities for further landscaping

							work electronic counters and WCs
Riverside Sculpture Park		2008 - 11	6,8	75k 09/10 Gateshead capital projects	Gateshead Council		Strategy and Action plan developed – ongoing Red Nile project delivered Capital funding is being sought for landscaping, signage & interpretation
Gateshead Quays 2 – Mixed use development potentially including hotel; visitor attraction; public space; a conference facility and new TIC / Visitor Centre		2009 onwards	£100m plus	1NG	Gateshead Council, ONE Private Sector	Approach being finalised through the 1 PLAN	Gateshead Quays 2 – Mixed use development potentially including hotel; visitor attraction; public space; a conference facility and new TIC / Visitor Centre
Developments at Gibside Yurt Village Camp Site Gibside Learning and Discovery Centre Facility development including footpath, food trail and guided tours		2009 - 10		National Trust			Yurt Village Opening March 2010 subject to planning permission.
St Mary's Lighthouse and Island		Unknown		£2.5m	North Tyneside Council		Feasibility Study completed. Identified as a priority project for NTC in 2010.
Stadium Village including Stadium Park Phase 2- inc. events and participation facility		Stadium Village 2006 – 19. Stadium Park 2 2010 - 2012	**1,2,**3,**4**,6,10	Stadium Village £100m Stadium Park 2 £33m	Sunderland Arc and Sunderland City Council		Stadium Village master plan at public consultation stage. Opportunities for large scale leisure development. Stadium Park 2 construction to start 2010
Sunniside – inc. visitor facilities:		2003- 2018	**2,4**,10	£130m	Sunniside	Private	Redevelopment

The Place and Riverside Improvements					Partnership	Sector, Sunderland City Council; ONE, Sunderland Arc, English Partnerships	underway

9. Strengthening tourism partnerships							
Projects 2008 -11	**Priority**	**Timescale**	**Related Objectives**	**Indicative cost**	**Lead**	**Support**	**Notes (status)**
Manage the monitoring, review and production of the Tyne and Wear Tourism Management Plan		Ongoing			TTW	LA, HWH, Private Sector	To be updated annually
Develop working groups . forums' drawn from partners and stakeholders to ensure the efficient use of experience and knowledge.		Ongoing	5		TTW	LA, HWHL, Private Sector	
Be the voice of tourism in Tyne and Wear within the regional tourism Network and beyond, to influence regional priorities		Ongoing			TTW	ONE, LA, HWHL, Private Sector	
Coordinate and deliver research and evaluation to help ensure effective project delivery and that evidence based policy decision in the visitor economy are taken.		Ongoing			TTW	LA, ONE, HWHLPrivate Sector	
Engage with all stakeholders and business representatives		Ongoing	**4**,5,6,7,8,		TTW		
Encourage sign up and roll out of Partners for England		Ongoing	7,8,**9**		LA	TTW	

4. The Process and the Partnership

4.1 The Area Tourism Partnership and its Priorities

Tourism Tyne & Wear is the Area Tourism Partnership (ATP) for the Tyne and Wear sub-region. The Shadow Board of Tourism Tyne & Wear was established in April 2006 to guide the set-up of the new Area Tourism Partnership and to develop the first ATMaP. The first actual Board was appointed at the end of 2006 and its members are listed in Appendix 3. It is chaired by Guy Hilton, General Manager of the NewcastleGateshead Hilton and includes a mix of public and private sector members covering accommodation, attractions and transport. All members agreed to adopt Nolan principles whilst serving on the Board. One of the core responsibilities of the ATP Board is agreeing the ATMaP.

Similarly, Tourism Tyne & Wear will not operate in isolation. It will be part of a formal Network that will include the Regional Tourism Team and the three other ATPs. This will be a true partnership arrangement which is at least as much about the ATPs influencing the work of the Regional Team, as it is about the Regional Team guiding and co-ordinating the work of the ATPs. Tyne and Wear is not a natural boundary for tourism from the perspective of the visitor, and we will work closely with Durham and Northumberland in particular to maximise the collective assets.

The local authorities are key delivery agents for so many aspects of tourism including tourist information centres, planning, transport, public realm and the support and management of museums and attractions. In Tyne and Wear each local authority has a tourism manger or team. In NewcastleGateshead NGI manages tourism marketing and PR, a convention bureau and cultural events with a regional remit. NGI is the host body for the Area Tourism Partnership servicing the board and providing support services with Sunderland City Council acting as accountable body for regional funding.

This ATMaP was originally developed by Tourism Tyne and Wear's Shadow Board and has been updated to reflect the work of the actual board and the maturing regional tourism network. Many other organisations have contributed to this ATMaP and the partners who will help deliver the plan are listed in Appendix 4.

4.2 The ATMaP Process

To produce the original plan, we:

- Reviewed tourism, leisure and cultural strategies, objectives and priorities covering Tyne and Wear
- Audited local authority roles, responsibilities and activity
- Identified priorities for the area
- Identified current capital projects and future priorities
- Had individual discussions and reached agreement with Tyne and Wear Local Authority Chief Executives/Assistant Chief Executives and individual tourism teams
- Consulted with local authorities and other public-funded agencies, and private sector businesses and business organisations through a series of workshops

Now that the ATMaP has been updated, it will be published on www.tourismnortheast.co.uk with a request for feedback from the Tourism Industry.

Any new projects will be submitted to the ATP Board for inclusion in the ATMaP.

We have developed a review cycle for future years:

Review:	**Direction**:	**Engagement**:	**Finalisation**:
What has been achieved so far in current ATMaP? What more do we know about tourism in the sub-region? (research, data etc) What do related strategies say on tourism?	What is the view and expert guidance of the ATP in terms of overall direction? Are the priority themes still appropriate for the structure of the ATMaP? Board agree draft	1st draft to partners. Consultation with partners 2nd draft on website for consultation period	Final draft to Board for sign off ATMaP signed by Chairman Post final ATMaP on website and produce key message document for industry.
July	**July**	**August**	**September**

4.3 Project Assessment Criteria

The projects identified in the ATMaP are a combination of ongoing work streams that require funding and resource in order to deliver and one off capital projects that will have impact on the visitor economy. There are also a series of projects in the planning stages that feature in the project tracker in Appendix 2.

The development of all the ATMaP projects are inextricably linked to the development of the Visitor Economy and the broader regeneration of Tyne and Wear and as such are not prioritised at this stage. We will adopt a set of criteria that should be used to help partners develop "healthy" projects and if required, allow them to make informed funding applications. The ATP will also use the process to endorse certain projects if required i,e letters to support planning applications.

The ATP Board, as the custodians of the ATMaP, will also use this process if required to prioritise projects, especially for single programme allocation. This process needs to identify:

1. The potential benefit
2. How achievable is it?

In order to prioritise, the Board will use the following criteria. These are described in more detail in Appendix 5

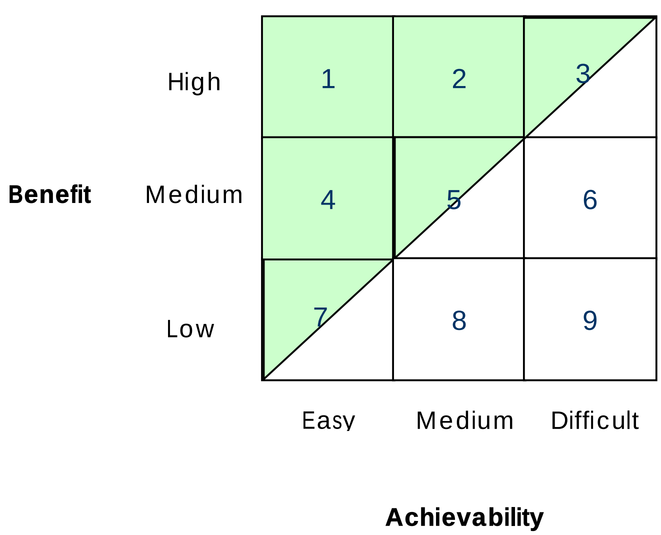
What's the potential benefit?

- Strategic Fit
- Regional benefit
- Evidence of Need
- Measures of Success
- Quality
- ROI and Value for Money

How achievable is it?

- Appropriateness of funding
- Viability
- Deliverability
- Evaluation and Monitoring
- Contingency Plan + risk
- Environmental sustainability

The following simple framework will be used to plot projects to determine which is a higher priority.



Appendix 1: Documents consulted to provide strategic context for ATMaP

A range of regional, sub-regional and local policy documents provide the 'strategic context' for tourism promotion and development in Tyne and Wear, and for this plan. These include:

Regional

- The North East Tourism Strategy (published in 2005)
- The Tourism Marketing Plan for North East England 2005 – 2010
- The North East Marketing Framework Review – draft report
- Regional Economic Strategy
- Regional Economic Strategy Action Plan
- 2007 North East Coastal Action Plan

Sub Regional

- Mapping Culture in Tyne and Wear, produced in 2004 by Shared Intelligence on behalf of the TyneWear Partnership
- The Tyne and Wear Coastal Strategy, produced in 2004 on behalf of North Tyneside, South Tyneside and Sunderland

Local

- The NewcastleGateshead Initiative Vision and Corporate Plan (2006-07)
- Gateshead Cultural Strategy (2005-10)
- Our Countryside – Gateshead Countryside Strategy (2003)
- South Tyneside's Tourism Strategy (2007 – 2012)
- North Tyneside's Tourism Strategy (2007 – 2012)
- Sunderland's Cultural Strategy
- Sunderland's Image Strategy.
- Newcastle's Regeneration Strategy
- Newcastle City Centre Partnership – Business Improvement District Plan

In addition to these documents, since the creation of the North East Tourism Network, the following reports / studies have been completed which provide a useful background:

- Accommodation Study
- Business Tourism Review
- Quality Action Plan
- Visitor Information Strategy
- Cruise Tourism Action Plan
- Regional Tourism Workforce development plan
- Tyne and Wear Hotel Development Study
- Bi annual Visitor Profile Research
- Legible Cities reports for Tyne and Wear and Sunderland

Appendix 2: Capital Project Tracker

Newcastle	Priority	Timescale	Indicative Cost	Lead	Support	Notes (Status)
'Heritage of Heart of City' cluster of attractions		HLF bid in process of being restructured	£4.75 m bid to HLF	Heart of the City Partnership	1NG, Newcastle City Council, HWH	Partnership formalised as company Sept 07
Eldon Square Developments		Opening Feb 2010	£180m	Capital Shopping and Newcastle City Council	Private Sector	
Walk / Ride (Legible Cities) Project		2009 -2011	£2.5 m	Newcastle City and Gateshead Councils	TTW, 1NG, BID, ONE	One of several Legible Cities projects being developed across Tyne and Wear
Central Station Gateway Project		Unknown	Unknown	Newcastle City Council	Nexus, National Express, Rail Track	Looking at interface between station and the city.
Newcastle Racecourse		Unknown	Unknown	Private Sector Operators		Looking to extend the offer
Waygood Gallery		2009	£4.1m	Newcastle City Council	ONE, Arts Council	Will include 30 artist units

Gateshead	Priority	Timescale	Indicative Cost	Lead	Support	Notes (Status)
Gateshead International Stadium – further development		2008 - 2011	c £10m	Gateshead Council	ONE	Business Plan prepared. Costs finalised. Outline design (RIBA Stage C) complete. Work progressing to Stage D. Business Case to be submitted to ONE in September. Important part of Olympic planning for the region.

Gateshead Quays 2 – Mixed use development potentially including hotel; visitor attraction; public space; a conference facility and new TIC / Visitor Centre		2009 onwards	£100m plus	1NG	Gateshead Council, ONE Private Sector	Approach being finalised through the 1 PLAN
Trinity Square – hotel and leisure facilities. Student Accommodation Within mixed use development of Gateshead Town Centre		2009 - 2012	£100m (whole scheme)	Spenhill, ONE and Gateshead Council		Planning application – Autumn 2009
Hotel Development inc: High Street South Brett Oils Site South Shore Road Hawks Road The Point		2008 - 2012		Developers and Gateshead Council		Various planning applications in development
Developments at Gibside Yurt Village Camp Site Gibside Learning and Discovery Centre Facility development including footpath, food trail and guided tours		2009 - 10		National Trust		Yurt Village Opening March 2010 subject to planning permisioon.
Derwent Valley Centre Feasibility work in the development of a purposed centre of excellence+		2009 - 2112		Gateshead Council	National Trust, RSPB, Northern Kites Project, Northumbrian Water Environmental agency & local businesses	
Angel of the North – Infrastructure Development		2008-10		Gateshead Council		10-year celebrations 2008 Coach & Car park complete. Exploring additional funding opportunities for further landscaping work electronic counters and WCs
Conference and Exhibition Centre		2009 - 2012	Approx £25m	1NG	NGI, ONE, Gateshead Council, Newcastle Council, TTW	An initial study from a team led by KPMG concludes a market does exist within NewcastleGateshead and that the site at Gateshead Quays should be pursued in more

						detail.
Riverside Sculpture Park		2008 - 11	75k 09/10 Gateshead capital projects	Gateshead Council		Strategy and Action plan developed – ongoing Red Nile project delivered Capital funding is being sought for landscaping, signage & interpretation
Red Kite Trail upgrading		2010+	£20k	Gateshead Council		Building & improving on existing routes in Derwent Valley
Bowes Railway Path		2010-2012	£500k	Gateshead Council	Sustrans, Durham CC, Sunderland & S Tyneside councils	Improvement to surfacing, drainage, signage, local access links to this important route linking 4 L/As
Keelman's Way Improvement		2010 - 2012	£1m - £350k secured through developer contributions	Gateshead Council		New link between Stella & Blaydon, avoiding busy road & rail crossing Replacement of substandard bridge over the Derwent. Part of C2C & NCN14

North Tyneside	Priority	Timescale	Indicative Cost	Lead	Support	Notes (Status)
Diving / sailing / water sports centre plus infrastructural initiatives incl. Water Taxi provision at North Shields Fish Quay		2008 onwards 5 – 10 year project	£5m	North Tyneside Council	Private sector	Early discussions / feasibility
Stephenson Railway Museum		Unknown	£3m	North Tyneside Council	Tyne and Wear Museums	Feasibility Study completed
The Dome Arts and Cultural Centre, Whitley Bay.		2008 - 10	£4.5 m	North Tyneside Council	Private Sector developer	Renovation works nearly completed
Tynemouth Station		2008 – 2010	£3.5m (est)	North Tyneside Council	ONE, English Heritage	Included as part of Sea Change bid

Development of Strategic Sites around Tynemouth Longsands. Could include regional surf / watersports centre		2009 onwards 5-10 year project	£6 - 10m	Private Sector	North Tyneside Council	Discussions with potential developers underway. Consultants appointed for coastal master planning.
St Mary's Lighthouse and Island		Unknown	£2.5m	North Tyneside Council		Feasibility Study completed. Identified as a priority project for NTC in 2010.
Multi-functional artificial reef		2008 - 2012	£3m	North Tyneside Council	Newcastle University Natural England, Private sector	Initial feasibility complete. Funding search underway.
Improvements to the promenade		2008 - 2012		North Tyneside Council		Included as part of Sea Change bid
Gateway /Public Art With South Tyneside		Ongoing	£0.1m – £2m	North Tyneside and South Tyneside Councils		Feasibility Study complete – seeking funding. Design proposals available for consideration.
Rising Sun Country Park Camp Site				Private Sector	Northumberland Land estates, North Tyneside Council	Planning application submitted

South Tyneside	Priority	Timescale	Indicative Cost	Lead	Support	Notes (Status)
Arbeia Roman Fort		2009 5-10 year project	£6 – 10 m	South Tyneside Council and HWH	Tyne and Wear Museums	Feasibility Study completed. Project will only proceed as part of wider Hadrian's Wall development.
Foreshore Development - promenade and sea defence improvements	Key priority for ST Council	2009 onwards	£4m (£1m ST Council - £1m Sea Change - £2m Sea Defence)	South Tyneside Council	Sea Change Defra	Foreshore master plan produced

Foreshore Development - Pier Parade Leisure Space – Waterpark	Key priority for ST Council	Provisional opening July 2011	£15m approx	South Tyneside Council		Project at feasibility stage. Site acquired and design being progressed.
Wearmouth-Jarrow, World Heritage Site	Key priority for ST Council	2011	Phase 1 £600k Phase 2 - £500k	South Tyneside and Sunderland Councils World Heritage Site Management Group	ONE, TTW	WHS decision expected 2011 following submission to UNESCO in 2010
Souter Lighthouse and the Leas Improvements to the shop and interpretation of site mainly through improved interpretation boards along the Leas and around the lighthouse. Feasibility study planned 2009-10. 2010-11 work planned.		2009 - 2011	Bid to National Trust central funds	National Trust		
Gateway /Public Art With North Tyneside		Ongoing	£0.1m – £2m	North Tyneside and South Tyneside Councils		Feasibility Study complete – seeking funding. Design proposals available for consideration.
Educational Centre, Bents Park			£3m	South Tyneside Council		
Bents Exhibition Park: permanent stage			£750K	South Tyneside Council		Seeking funding
Ocean Beach redevelopment		Phase 1 complete 2007 - 2010	£5m	Private Sector Operators		Provides all weather complex
South Shields Riverside inc hotel, heritage, park development	Key priority for ST Council	Now - 2019	£300m approx			Phased development programme

Sunderland	Priority	Timescale	Indicative Cost	Lead	Support	Notes (Status)
Seafront Regeneration	Key priority	2009-2010 for strategy	£200,000 for strategy development £1.5m for public realm improvements to Marine Walk	Sunderland City Council		Regeneration Strategy emerging and bid to be submitted to Sea Change fund
Wearmouth-Jarrow, World Heritage Site	Key priority	2011	Phase 1 £600k Phase 2 £500k	Sunderland City Council and South Tyneside Council World Heritage Site Management Group	ONE	WHS decision expected 2011 following submission to UNESCO in 2010
Cultural Quarter Maritime Museum/Arrivals Lounge etc.	Key priority	2009-2011	£10M	Sunderland City Council	ONE, HLF, University of Sunderland, ERDF, Working Neighbourhoods Fund	Project Development Underway
Gateway improvement linked to central station	Key priority	2009-2010	£1.6M	Sunderland City Council	Regeneration partners	Developing proposals
Sunderland Legible City projects	Key priority	2008 – 2010	£30k approved by NRF for Phase 1. Full project cost estimated at £2.2M	Sunderland City Council and pilot project phase with Sunderland University	ONE, Tourism Tyne and Wear, Private Sector	Consultants study completed. Developing plans to take forward implementation of legible City project
Hotel Developments including: Farringdon Row, Bonnersfield and Stadium Village	Key priority	2008-2011	Various	Sunderland Arc,	Private sector	Planning permission granted April 2008
Vaux site redevelopment proposals including hotel, extensive public realm and riverside access proposals	Key priority	2010-2019	£100M+	Sunderland Arc	Sunderland Arc and private sector	Outline planning permission granted March 2007. Developer procurement process commences September 2008
Holmeside retail and residential including The Spirit of Sunderland tower block	Key priority	Unknown	£190M	Sunderland Arc	Sunderland Arc and private sector	Thornfield appointed as preferred developer
Bowes Railway		t.b.c.	t.b.c	Sunderland City Council		Feasibility study completed. Site suffering severe

						vandalism. Funding needed to secure site and protect this Scheduled Ancient Monument
Empire Theatre ‘Fly-Tower’ artwork		Expected completion date April 2009	t.b.c.	Sunderland City Council	t.b.c	Public consultation held on artists proposals

Appendix 3: Members of the Board of Tourism Tyne & Wear

Mr Guy Hilton, General Manager, Hilton NewcastleGateshead

Cllr John Mcelroy, Gateshead Council

Cllr Jim Allan, North Tyneside Council

Cllr Melville Speding, Portfolio Holder for Culture & Leisure, Sunderland City Council

Mr Andy Bairstow, Communications Director, Nexus

Ms Katherine Pearson, Chief Executive, National Glass Centre

Ms Linda Tuttiett, Chief Executive, Hadrian's Wall Heritage Ltd

Mr John Crummie, Managing Director, DFDS Seaways Limited

Mr Michael Ruddy, General Manager, York House Hotel & Apartments

Ms Cristina De Giorgi, Director, Gusto UK

Ms Melissa Denton Hawkes, Director of Corporate Services, Port of Tyne

Appendix 4: The partners who will help deliver the ATMaP

- Tourism Tyne & Wear
- NewcastleGateshead Initiative
- Tyne and Wear Local Authorities
- 1NG
- Individual businesses, organisations and consortia within the visitor economy
- Tyne and Wear Attractions Forum
- Local private sector Tourism and Trade Associations
- Transport providers
- English Heritage, National Trust, Arts Council North East, Audiences NorthEast
- Museum and Libraries Association and Tyne & Wear Museums
- Hadrian’s Wall Heritage
- Business Link North East
- Tyne and Wear Learning and Skills Council
- Universities, colleges and other training providers
- Voluntary and Community Sector
- The North East Chamber of Commerce
- One NorthEast Regional Tourism Team
- Tourism Network NorthEast
- Newcastle City Centre Partnership (NE1)
- England’s North Country.

Appendix 5 : Criteria to prioritise projects

1. Strategic fit	This means that activities and projects should contribute to/fit with the objectives of the regional tourism strategy and strategic priorities of the Tyne and Wear ATMaP. Projects/activities that meet the criteria will be viewed as more relevant to the development of tourism in Tyne and Wear and all activities and projects should seek to explain how they fit with these criteria specifically. The objectives that are relevant to strategic fit are listed below. Regional priorities relevant to 'strategic fit': • Attract more domestic and international visitors to the region. • Increase tourists' average spend and increase day visitor spend • Increase visits throughout the year, not solely in the main holiday season. • Increase employment in tourism and tourism-related businesses. • Improve the productivity of the regional tourism economy • Accelerate the rate of investment in the tourism product • Improve the quality of the tourism product in the North East. • Improve the quality of the tourism workforce in the North East. • Enhance and conserve the region's natural, heritage and cultural assets. Relevant Tyne and Wear Priorities are: • The development of Business Tourism • Delivering a world class events programme • Increasing the online visibility and capacity of Tourism Businesses • Enabling Coastal Regeneration • Transforming the provision of visitor information • Improving the quality of the tourism product • Delivering effective marketing • Providing great attractions and new reasons to visit
2. Evidence of need	Projects and activities should be clear about three issues: 1. that there is a clearly identified market for the proposal outputs, a demonstrable need 2. that the proposal is able to meet the needs of this market 3. an analysis of competitors active in the market place and assessment what impact, positive or negative, their activities will have on the proposal. If there are no competitors you should address the question, Why is this? Look at the origin of demand i.e. who is asking for this and why? The purpose is to take account of competitors and ensure that proposals are not just moving visitors from one part of the county to another, but will attract new audiences. The main thrust of these criteria is customer focus.
3. Return on Investment (ROI) and value for money	Projects and activities need to be costed accurately and ensure that they represent value for money. This should include an options appraisal; value for money includes demonstrating that the project or activity cannot be delivered more economically either by the proposer or by someone else. There should also be a clear statement on the return on the investment and any timescales attached to achieving a good return. Applicants should take into consideration (if appropriate) if the project will have a direct economic impact e.g. jobs created, jobs safeguarded, new businesses and new businesses improving their performance.
4. Appropriateness of funding stream	Public sector funding in some cases is not always the most appropriate source of funding. Projects and activities will need to identify the funds they intend to apply

	for and explain why these sources are appropriate to the project/activity. In a nutshell, why is public intervention needed?
5. Viability	Viability addresses long-term funding plans and particularly relates to capital projects and infrastructure improvements to the tourism product. There must be a statement on the life span of the project e.g. 'short', 'medium', 'long', 'ongoing' as well as clear indications on the economic viability and exit strategy from public funding, if that is what is being sought. It is not essential to demonstrate an exit strategy because some activity may be very important to the success of tourism in Tyne and Wear but will always need public support. Where this is the case, a clear reason for continued public funding must be given.
6. Deliverability	As well as the readiness of a project for implementation and a view on whether it will be completed on time, to budget, with risks and obstacles resolved, the capacity and ability of the people proposing to deliver needs to be taken into account. It may be advisable to include track records of delivering projects and also the transferable skills of those delivering the project. If there is a gap in skills or knowledge this should be acknowledged and measures to address this outlined –this could mean identifying someone else that could deliver more effectively or capacity building activity.
7. Evaluation and monitoring	Projects and activities need an evaluation and monitoring process embedded in them. Applicant should include examples of appropriate independent industry benchmarking schemes. Where possible projects and activities should strive to be regional exemplars for development, dissemination of innovation and best practice but this is not mandatory.
8. Sustainability	Projects/activities must demonstrate, where appropriate, that they have taken into account the principles of sustainable development and this includes sourcing locally, community focus, environmentally sound. This can be addressed by expanding on the environmental Measures of Success detailed below.
9. Measures of Success (VICE)	The VICE model has been adopted as a model for sustainable tourism development from the national level down and identifies four beneficiaries of tourism activity: the visitor, the industry, the community and the environment VICE. It is important that projects and activities are acceptable and/or beneficial to both the community and the environment and, for them to contribute to the visitor economy, they should also be beneficial to either the industry or the visitor – ideally both
10. Quality	Projects/activities should either be, or aspire to be, the best of their kind and of a quality that meets the needs of the target market. It is important to remember that the demands of the market do change; regular research is important. Where appropriate, regional or national quality marks, or whatever accreditation is appropriate, should be part of the project plan. Accessibility can also be taken into consideration, how will the project be inclusive and accessible?
11. Contingency Plans	Projects/activities should pay some attention to risk, what is their exposure, what are the risks of under or over achievement and are there any contingency plans in place?