



Sunniside

Place Analysis Report

Part 1. Understanding Sunniside.

May 2023

TOWN.




CREATE
streets



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Section 1

Executive summary

Executive summary

In December 2022, Sunderland City Council commissioned TOWN and Create Streets to develop a masterplan for Sunnside.

To deliver this strategic document, TOWN and Create Streets embarked on an early-stage process to build a broadly-based understanding of Sunnside.

This Place Analysis Report, published in May 2023, is the first part of the masterplan providing analysis of Sunnside based on a first phase of engagement and research.

This report sets out an understanding of the Sunnside drawn from intelligence and commentary from stakeholders and the community, data and research, and a spatial analysis of the attributes of the area and likely or potential areas of change.

It identifies the strength, weaknesses and opportunities for Sunnside that are important factors for developing a strategy;

It identifies the threats to Sunnside and the risks to investment that must be mitigated against;

It identifies the objectives for the masterplan in support of the City Council's corporate strategies.

It develops a needs analysis that will be used to inform the second stage of work, to be published in Summer 2023: the strategy and delivery plan.

The masterplan was commissioned as part of the City Council's Partnerships for People and Place (PfPP) pilot programme funded by the Department for Levelling-Up, Housing and Communities' (DLUHC). PfPP promotes a partnership approach to locally-led, place-based problem-solving.

May 2023



Section 2

Introduction

Introduction

Sunniside is an historic part of the urban core of Sunderland, it lies south of the River Wear, east of the main city centre retail core and emerging central business district. The north west corner touches on the boundary of the Riverside Masterplan and the emerging Central Business District within this area.

a Sunniside masterplan. It provides a basis for continuing dialogue with and among decision-makers, stakeholders and the community to appraise and prioritise interventions and align capacity and resources to maximise their impact. It does this by:

including activities and projects already in the pipeline; and

- From this analysis, it proposes objectives to inform the second, prescriptive, stage of work, to be published in Summer 2023: the strategy and delivery plan.

- Setting out an understanding of the place drawn from intelligence and commentary from stakeholders and the community, data and research, and a spatial analysis of the attributes of the area and likely or potential areas of change;
- Identifying current and expected future influences on the development of the area,

Over the next decade, Sunniside is expected to see a lot of change as a result of Sunderland City Council's ambition to grow significantly the population living in the urban core, and of developments elsewhere which are changing the geography of how and where people live, work, socialise and move about in central Sunderland.

In December 2022, the Council commissioned TOWN and Create Streets to develop a masterplan for Sunniside. The purpose of this is:

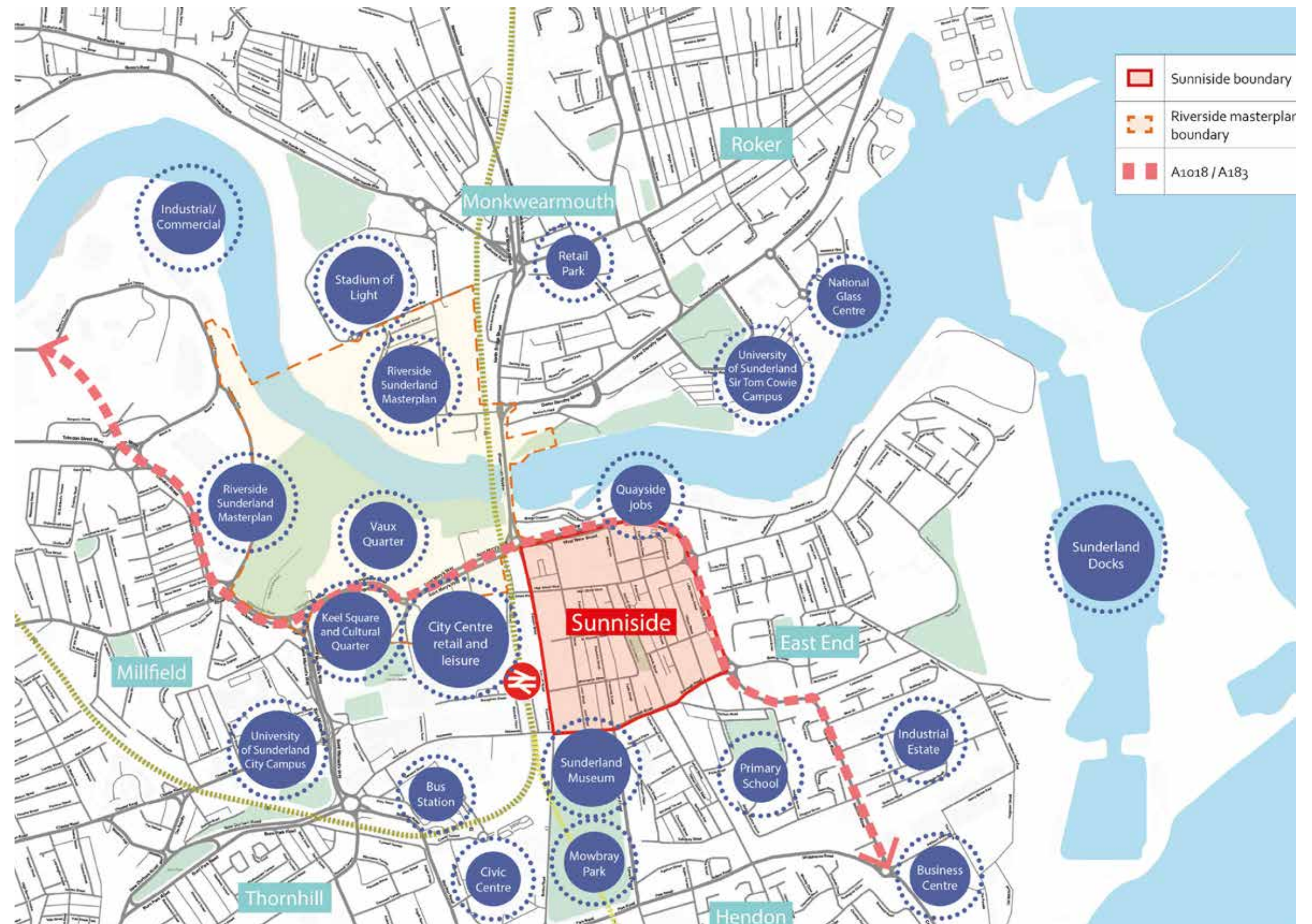
- To build a broadly-based understanding of Sunniside's assets, opportunities and problems in the context of the ambition the Council and local partners have for the area over the next ten years, including the successes and failures of previous investments in regeneration;
- To define objectives for future change which build on the area's assets, take the opportunities that exist and solve the problems holding the area back; and
- To set out a programme of specific short-, medium- and longer-term cross-sector capital investments and other activities in pursuit of these objectives, with funding and delivery responsibilities ascribed where practical and steps to secure those arrangements proposed where not.

The development of this strategic document has been funded under the auspices of the

Department for Levelling-Up, Housing and Communities' (DLUHC) Partnerships for People and Place (PfPP) pilot programme. PfPP promotes a partnership approach to locally-led, place-based problem-solving in which the resources and activities of different public services, community organisations and others with an interest in outcomes in the area align their activities and resources behind a unified plan. The local authority has a convening role in drawing up the plan but ownership of the actions and outcomes within it are widely shared. In Sunniside, important partners include:

- Central Government; with lead support from DLUHC;
- Sunderland City Council;
- Local government beyond Sunderland City Council e.g. local agencies, partners and commissioned services including Sunderland Business Improvement District (BID);
- Police and the Sunderland Altogether Improving Lives (SAIL) initiative, a partnership initiative itself;
- Local agencies, organisations and third sector groups;
- Local businesses, creative industries and cultural partners;
- Local residents;
- Private developers and investors; and
- Homes England.

This Place Analysis Report, published in May 2023, is the first, diagnostic phase of



Section 3

Changing Sunnyside

Changing Sunnyside

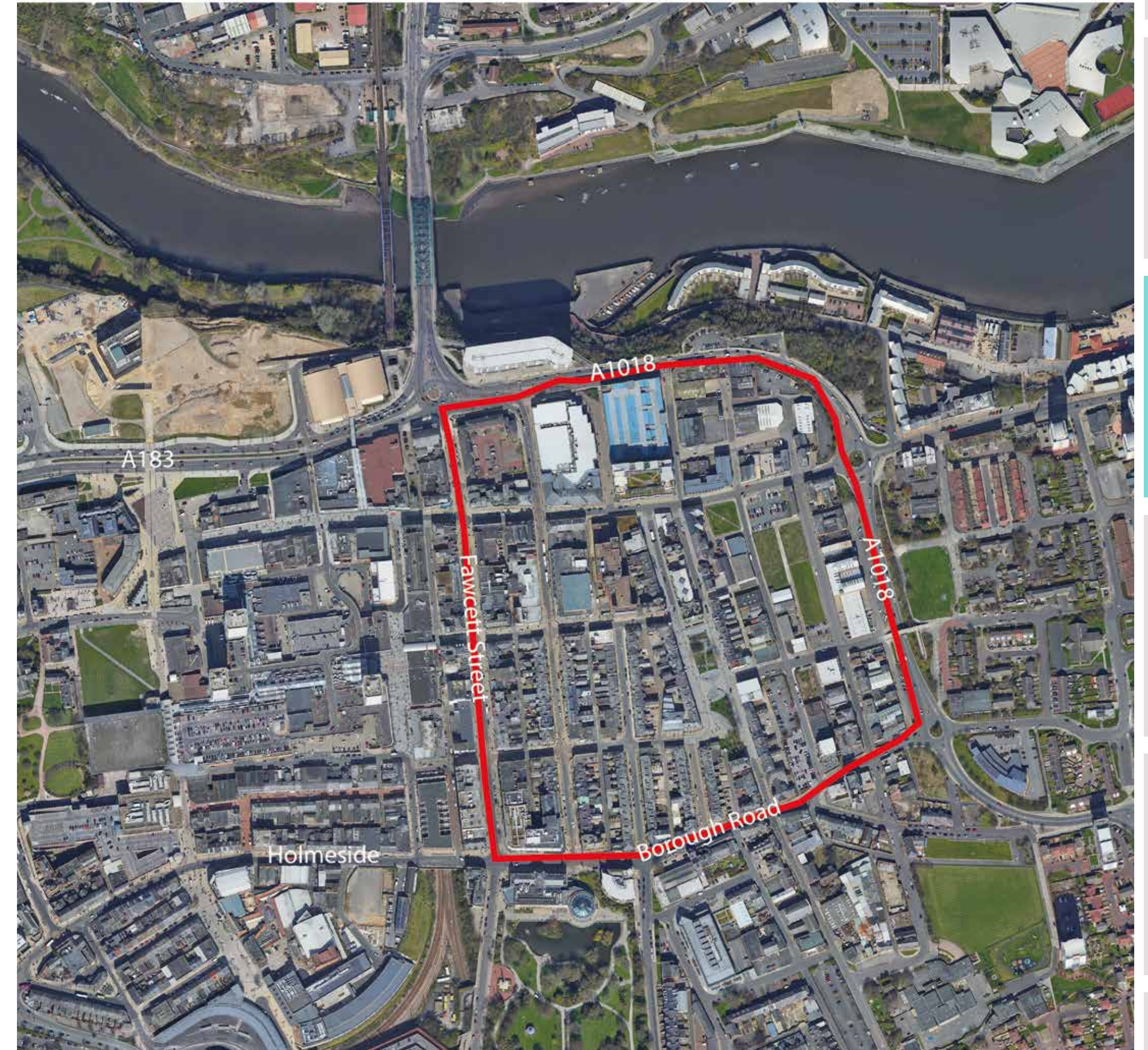
Sunnyside is a central neighbourhood of Sunderland bounded to the north and east by the A1018 road, with the East End neighbourhood beyond, to the south by Borough Road and the Hendon Ward and Mowbray Park beyond, and to the west by Fawcett Street delineating the retail core. The extent of the area is not universally agreed upon, but for the purposes of the Masterplan a widely-held definition of Sunnyside is adopted, with the north and east bounded by the A1018 ring road, the south by Borough Road and the west by Fawcett Street. This area contains around 19 hectares of land.

Historically, this area of

Sunderland emerged in two parts. The northern and eastern area developed in the early 18th Century as Old Sunderland (now the East End) grew westwards from the port along the important road to Monkwearmouth, accommodating a growing population and the land demands of industrialisation. The western and southern areas developed in the late 18th century as the city's main business district, with accommodation for merchants serving the port city, and the urban grain and architectural style of this Georgian period is evident across the area. Sunnyside remained an important commercial and



The historic character of Sunnyside is preserved in Georgian terraces of West Sunnyside, Foyle Street above.



Sunnyside masterplan boundary

Thirty years of regeneration



Looking west along Coronation Street in 1964 (top) and street map from 1941 showing the fine-grained fabric of Sunnyside, much of which was lost in the eastern area during the mid twentieth century.

1990s

By the early 1990s, Sunnyside's post-war decline had followed the pattern of many UK inner-city neighbourhoods, with a cycle of falling employment and economic activity, rising crime and environmental degradation and attendant population loss and physical decay. Designated a priority for urban renewal in the late 1990s, the City Council was supported by the then English Partnerships organisation in assembling derelict land and property. There was a partially successful focus on stemming the outflow of professional and personal services businesses from the Georgian streets of west Sunnyside.

2000s

In the 2000s, a new wave of area-based initiatives focused on achieving an "urban renaissance" saw the foundation of Sunderland Arc and later the Sunnyside Partnership. Significant public investment in the area saw the Sunnyside Gardens public realm scheme delivered with the aim of giving the neighbourhood a high quality, focal public space. A grant scheme was introduced for the conservation and improvement of listed buildings, public realm improvements were extended into the streets between West Sunnyside and the city centre, and The Place cultural venue was built.

Private and third-sector investment in the area also grew, with the refurbishment of the Old Post Office into apartments and several new-build apartment schemes aimed at attracting young professionals to Sunnyside. New leisure and hospitality businesses opened close to Sunnyside Gardens.

The vision unifying this investment in the 2000s – over £100 million in total – was of Sunnyside as a "revitalised distinctive mixed use city quarter which is an efficient, accessible and vibrant place." The aims of this strategy remain pertinent today:

- "A unique, memorable and sustainable urban environment, that builds on the high-quality historic core of the area with exemplary contemporary design."
- "A desirable, centrally located living area offering a mix of high quality residential accommodation that will encourage families back to live in the city centre."
- "A distinctive retail market, attractive to people because of its uniqueness."
- "A place which stimulates creative activity and creates a unique cultural life."

2010s and early 2020s

The abolition of regional development institutions from 2010 and their replacement with centrally allocated regeneration funding schemes, together with a shift in policy focus toward areas that had received less investment in previous years, reduced public-sector led investment in Sunnyside in the first half of the decade. Then, partly in response to renewed central government policy focus on and funding for high street regeneration, an "investment corridor" strategy was developed for High Street West which ultimately led to a successful bid for Historic England 'Heritage Action Zone' status and funding, a five-year programme running from 2017 to 2022.

The objective of the HAZ was to rejuvenate the city's historic high streets including High Street West and Fawcett Street, reconnect the Old Town, City Centre and Waterfront through heritage-inspired regeneration and redevelop the area in a way that positively impacted upon economic growth. The project included a mixture of research, repair and regeneration work through adaptive reuse, alongside various community-based schemes, which aimed to encourage local people to become involved with their heritage, especially through the reuse of historic buildings. Interventions included the renovation of 170-175 High Street West led by the Tyne and Wear Building Preservation Trust, the grant-aided restoration of the Hutchinson Buildings by private owners which has been transformed into a retail emporium for creative independent businesses, the renovation of the Elephant Tea Rooms by the Council and 177 High Street West, formerly a Tyre Shop, by the Tyne and Wear Preservation Trust.

The mid-2010s also saw the beginning of sustained growth, led by the private and not-for-profit sectors, in provision of affordable workspace in Sunnyside, with creative businesses migrating to the area attracted by low rents and a likeminded creative community inhabiting an attractive heritage environment.

Impact, and residual challenges

Regeneration is a long game. Invariably, public expectation is that many decades of decline can be reversed in a somewhat shorter timeframe. In reality, the impact of local regeneration interventions is often outweighed by more fundamental market and policy forces and conditions, such that their benefit is only fully realised when these wider, 'macro' conditions change.

Interventions in Sunnyside that focused on heritage conservation and public realm improvement have been an evident, if qualified, success. Visually the neighbourhood, especially west of Norfolk Street, is much improved; the function of the Georgian streets as a business district for professional and personal services has been maintained and the HAZ interventions have introduced a diverse mix of new enterprises, including creative workspace, into well-restored buildings. Sunnyside Gardens bears the hallmarks of proper investment in robust, quality materials even if functionally it is still not playing the role it might as a focal gathering place within the neighbourhood. Other investments have, so far, been less successful. There is a legacy of low-quality private-sector residential development from the period, and of older buildings in private ownership which have continued to deteriorate. Some leisure businesses, such as the Travelodge hotel, have failed and their buildings face an uncertain future. The Place struggled from many years to attract and retain enough occupancy interest faced with lower-cost options nearby.

As subsequent sections will discuss, the main challenge to past regeneration strategies for Sunnyside is that the hoped-for influx of young professionals, students and others wanting to live in a central location amidst the bustle of the city has not materialised quite as hoped. Demand for properties designed and built for a more affluent market – such as the conversion of the Old Post Office – was sluggish from the start, perhaps indicating that whatever the merits of specific improvements in Sunnyside, a wider appetite for urban-core living had yet to take hold in Sunderland.

The 2008 financial crisis saw a significant drop in property values from which Sunnyside, unlike other areas, has never recovered. The need to cover finance and service charge costs saw property let at increasingly low rents, which coincided with a rapid expansion of the role of the private rented sector in meeting demand for affordable housing, supported by private-sector housing benefit (Local

Housing Allowance or LHA) which is set based on rents averaged across a broad area of the city and is, relative to size, more generous for smaller dwellings. The combination of low capital values and an effective rent 'floor' set by LHA means that, today, double-digit rental yields are achievable in Sunnyside by letting one-bedroom or bedsit/studio properties to tenants in receipt of LHA.

As a consequence, while there has been some growth and diversification of living in the area partly owing to the growing student population, the last two decades have seen a consolidation of Sunnyside's function as a neighbourhood to which people with limited housing choice, and often vulnerable and with complex needs, gravitate. This in turn contributes to other challenges:

- There is a concentration of support services for vulnerable people which are popularly seen as the basis of the economy of the area;
- The concentration of vulnerable people is evident in the way that public space – including Sunnyside Gardens – is used and this in turn acts as a deterrent to footfall and public space use by others;
- These factors deter a wider population from considering moving into the area; and
- Weak residential and daytime demand and spending power means that consumer-facing businesses (such as in the hospitality sector) located in the neighbourhood operate on a shoestring.



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Sunniside in a changing urban core

The challenges that the regeneration of Sunniside sought to confront from the late 1990s onward were in many ways a microcosm of those affecting Sunderland's wider urban core. Partly because of the city's success in attracting and forging new industries in strategic employment locations to replace those of the past centred on the river and port, the decades-long flow of jobs and residents out of the core to suburban and peripheral locations continued in Sunderland even as other cities began to reinforce their centres through new white-collar jobs and housing. As such, regeneration efforts in Sunniside were not so much capitalising on the energy of the wider city centre as attempting to catalyse it.

Today, the context is different. There is an understanding that the traditional role of the city centre as primarily a place for shopping is waning.

- Originally driven, and still exacerbated by, competition from regional shopping destinations and out-of-town 'big box' retail parks which are often more convenient for residents living in car-based suburbs, today's additional challenge comes from online shopping which is easy, quick and often cheap as vendors can be based far from the expensive rents of central locations. The infection control measures taken during the Covid 19 pandemic had further impact on high streets with the proportion of online retail sales accelerating nationally in 2020, briefly peaking at nearly 33% and expediting the population's

engagement with online shopping.

- The pandemic hit Sunderland city centre hard. City centre trading performance was 9% weaker in March 2022 than March 2019, compared to an average decline of 4% in larger cities (e.g. Manchester, Leeds, Newcastle). The night-time economy has been particularly challenged post Covid and this has resulted in a 6% shift toward the daytime economy in the city centre. City centre footfall in 2022 was down by 20% on average compared to pre-lockdown. Retail vacancy rates for High Streets in Sunderland as a whole (not just the city centre) were 25% in March 2020 and rose to 28% in June 2021.
- Those with higher disposable incomes, whether resident within Sunderland or visiting, are likelier to spend their money elsewhere: the Seafront area of Seaburn accounts for the highest share of affluent customers in the city and the highest proportion of sales to those from outside of Sunderland (33%) compared to the city centre (27%).
- Contrasting with the poor retail outlook, there are nascent positive trends. In particular, while the overall population of Sunderland decreased by 0.5% between 2011 and 2021, the total city centre population increased by 41% – from 2,189 people in 2011 to 3,089 in 2021 (this includes Sunniside with the inclusion of the Eco building with approximately 750 residents or 24% of the city centre population).

Evidence from the recent High Streets Task Force initiative has shown that, in place of the traditional retail focus, successful high streets and town centres tend to be places with a rich and varied mix of places to live, to work, to shop, to meet, to eat and to be entertained. Common to most is that the commercial offering is not only a destination for people visiting from the suburbs or other places; it acts as the local neighbourhood offering for a substantial residential population who make urban living a positive lifestyle choice. Quality of experience – of arrival, of public realm, of landscape and planting, of legibility and wayfinding, of cleanliness and safety – are also important.

Sunderland is now embracing this thinking. There is a renewed focus on the importance of the city centre to the prosperity of the city as a whole and in turn on the importance of people living and working in the urban core to the quality and diversity of the city centre offer. The City Council's city centre strategy aims:

- "To make Sunderland city centre an attractive and popular place to live, more than doubling the population and creating sustainable new communities;"
- "To inspire and retain talent by enhancing the education and skills offer;"
- "To maximise housing choice and accessibility by creating spacious, high quality new homes to buy and rent;"
- "To consolidate and enhance the prime retail pitch, complemented by an attractive independent retail, food and drink offer;"
- "To establish a new, regionally significant central business district, increasing the daytime workforce by 50%";
- "To diversify the city centre offer by extending the range of cultural, leisure and civic facilities;"
- "To restore and repurpose the built heritage of the city centre, and create a more attractive public realm;" and
- "To reduce the impact of traffic and encourage more people to walk, cycle and use public transport."

The early implementation of this strategy is already having a visible, positive impact on the city centre.

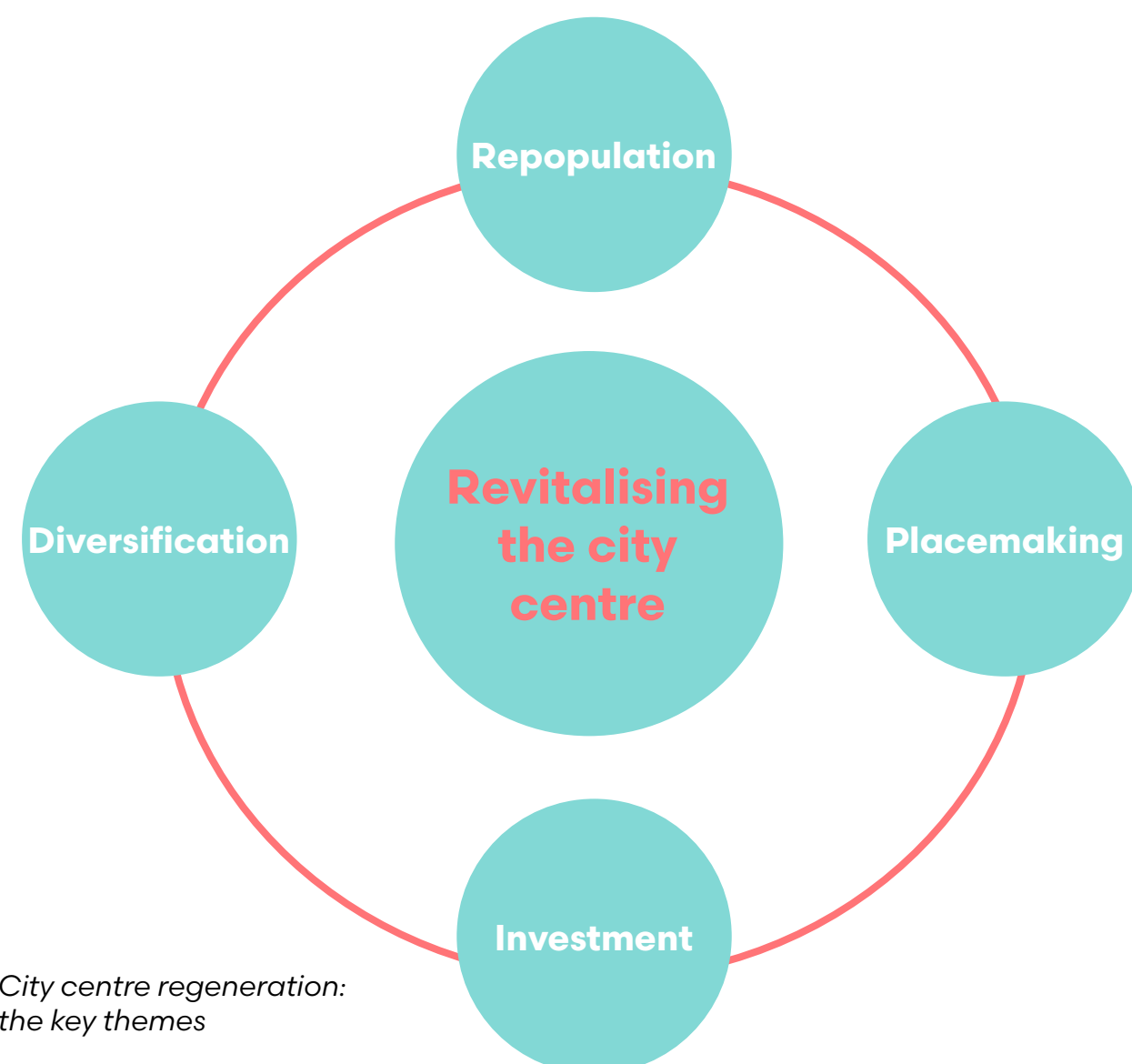
- Construction of The Beam, City Hall and further new office accommodation on the former Vaux site forms the basis of a new central office district creating between 8,000-10,000 new jobs.
- Adjacent, Keel Square and development around it both complete (such as Holiday Inn) and in the pipeline (Culture House) offer a new focus for the consumption of culture and leisure,

strategically placed at the intersection of High Street West and Riverside.

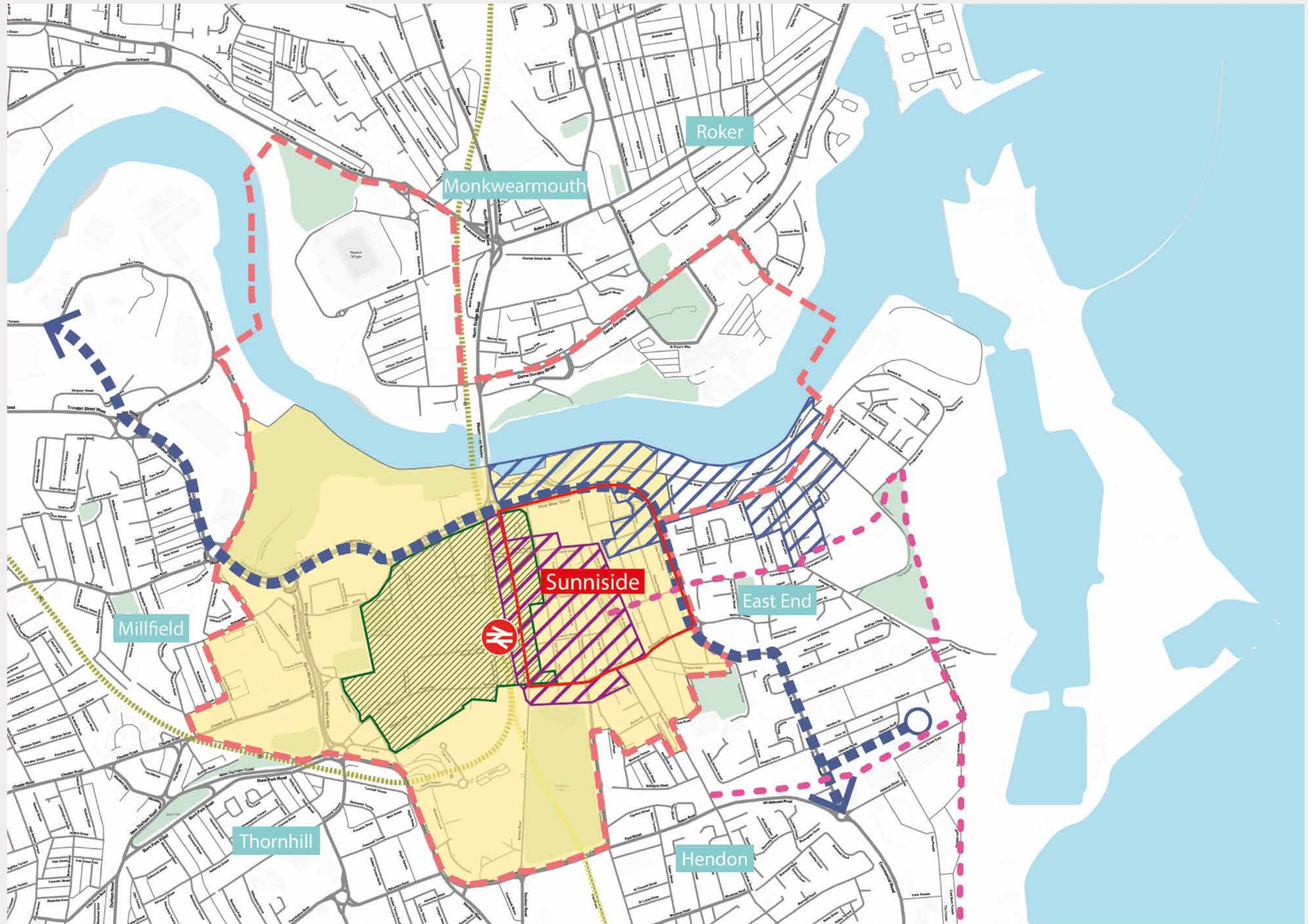
- Reconstruction of Sunderland railway station due to be completed in 2023.
- The Riverside Sunderland masterplan is expected to deliver 1,000 homes either side of the Wear, with the first 135 under construction at Vaux. Riverside in turn forms the centrepiece of a housing "ecosystem" strategy aimed at delivering 1,400 sustainable new homes for sale and rent in the city centre by 2030, aimed at attracting more affluent residents to live in the urban core and linked to a new Housing Innovation and Construction Skills Academy (HICSA) at Sheepfolds.

This new strategy, and the investments being made behind it, have important implications for Sunniside.

- First, Sunniside remains a key part of the city centre and has a key role to play in delivering the outcomes the strategy pursues. In fact, the vision and plan set for Sunniside 25 years ago – as a residential-led mixed-use neighbourhood – is more relevant than ever before as Sunderland pursues a regenerating strategy focused on repopulating the urban core.
- Second, the geography of the wider city centre is changing. The focus of investment at Riverside and around Keel Square is likely to pull the centre of gravity of 'prime' urban activity, including many cultural activities, westward. This effect is likely to deepen when the new Wear bridge is in place and a new pedestrian axis created between the city centre and the north of the city, including the Stadium of Light. This challenges Sunniside to develop a clearer, complementary offer with its own attractions and identity.
- Third, the drive for repopulation and housing delivery in the city centre places new emphasis on unlocking and delivering opportunities for new residential-led development in Sunniside, both through the redevelopment of currently vacant sites – including the Nile and Villiers site in east Sunniside – and the reuse and change of use of existing buildings, as well as additional amenities which attract and retain residents in the area. This in turn requires a new focus on tackling the barriers to people wanting to live in Sunniside, including the adverse effects of existing policy and market failures.



City centre regeneration:
the key themes



Sunnyside is a key site for delivering key policies of the Core Strategy and Development Plan.

Section 4

Sunniside today

Sunniside today

This section sets out an understanding of Sunniside today, exploring the nature, location, function and challenges of this city centre area.

Based on research, surveys, workshops and many conversations over a three month period this insight provides the groundwork for the development of a strategy.

Key data has been logged in the appendix to this report.

Living

Sunniside today is a diverse urban neighbourhood. There are around 400 people living in the defined masterplan area and around 750 people in a wider area including more of the northern area of the city centre, for which Census 2021 data is available. This wider area incorporates significant amounts of student accommodation and the Riverside apartment building on High Street West which affects the picture. Unless stated otherwise, commentary relates to this wider area.

The areas surrounding Sunniside contain some of the most deprived wards in the country. Lower-level Super Output Areas (LSOAs) adjacent to the Sunniside masterplan area fall in to the 1-2 percent most deprived in England when assessed against Indices of Multiple Deprivation (IMD). However within Sunniside itself, around 80% of households are not deprived at all or are deprived on only one dimension. This reflects the contrast between the student and young professional population and the wider population of East Sunderland. Unemployment is significantly above the national average at 9.5%. Economic inactivity is around 50% which again substantially reflects the student population.

Sunniside has a youthful population, with around 55% of residents aged 15 to 29. This undoubtedly reflects the student population, but around 15% are in the 25-29 bracket which may indicate some success in attracting and retaining former students and young professionals. This is in contrast with the city as a whole, which has an ageing population and a

significant net outflow of younger adults. The vast majority of households in Sunniside have either one-person (57%) or two people (33%) and, correspondingly, the vast majority of residential properties have either one (46%) or two (46%) bedrooms. Hardly any children live in the area. There is little residential ownership: only 8% of households own outright or with a mortgage, 22% of homes are social rented and 69% private rented.

People in employment living in Sunniside are more likely than in the city as a whole to be in white-collar jobs. The most prominent occupations are sales and customer service (20%), professional occupations (16%), low-skilled (typically blue-collar) elementary occupations (12%) and caring, leisure and other service occupations (11%).

Car and van ownership in the Sunniside area is very low – 74% of households have no car or van and only 3% have two or more. Low vehicle ownership is often indicative of a large student population, the convenience of alternative modes of travel, or high levels of deprivation and here it is likely to be a mix of all three.

The population of Sunniside are generally in good health (30%), very good health (49%) or fair health (14.2%). As highlighted above, this may be a reflection of the young population. However, poor health in the area is slightly higher than the national average with 5.4% of residents being in bad health and 1.5% of the population are in very bad health (compared to a UK average of 4.0% and 1.2% respectively).

Outside the masterplan and Census areas, mainly to the south of Borough Road in the areas along and around Tatham Street and Suffolk Street, there is a concentration of supported housing or 'hostel' accommodation and housing in multiple occupation (HMOs). There are estimated to be 109 rooms in registered supported accommodation within or in close proximity to Sunniside of which 18 are single rooms and 91 are shared with an approximate population of around 200 people. Supported accommodation is intended to be temporary and provide residents

with support to enable them to move into other housing where they can live independently but, in the unregulated sector, there are understood to be many long-term residents often with multiple complex needs. Residents from these properties, together with other vulnerable people living in the area, often gather in Sunniside Gardens and other points in Sunniside.

Commerce

Sunniside today is home to a wide range of enterprises: shops, professional services, hospitality and leisure businesses, personal service businesses such as hair and beauty, creative workspaces, light industry uses such as car services and offices of third sector and support service organisations including probation services.

There is a growing programme of events. Sunniside Gardens recently started hosting a bimonthly pop-up market which supports new and emerging food and drink businesses from Sunderland and the Northeast. Every Summer it plays host to Sunderland Pride and the two-day 'SunLun Calling' music festival (previously Sunniside Live) an event which has a capacity of 4,000 people per day. Bars in Sunniside run a more regular programme of events including weekly comedy nights, open mic nights and concerts. The Sunderland Bowl and Empire Cinema offer a year-round leisure destination for visitors to the city centre.

An important area of growth over the last decade has been in the provision of affordable workspace, both general business incubation accommodation and dedicated space for creative and cultural enterprises. Examples include:

- MBC Arts Wellbeing providing accommodation to over 50 artists in the Sunniside area with a continued demand for good quality, well supported space.
- Breeze Creatives, an affordable space operative, has also opened a working space for artists on Fawcett Street.
- Wear Commissioners building (opened in 2020)

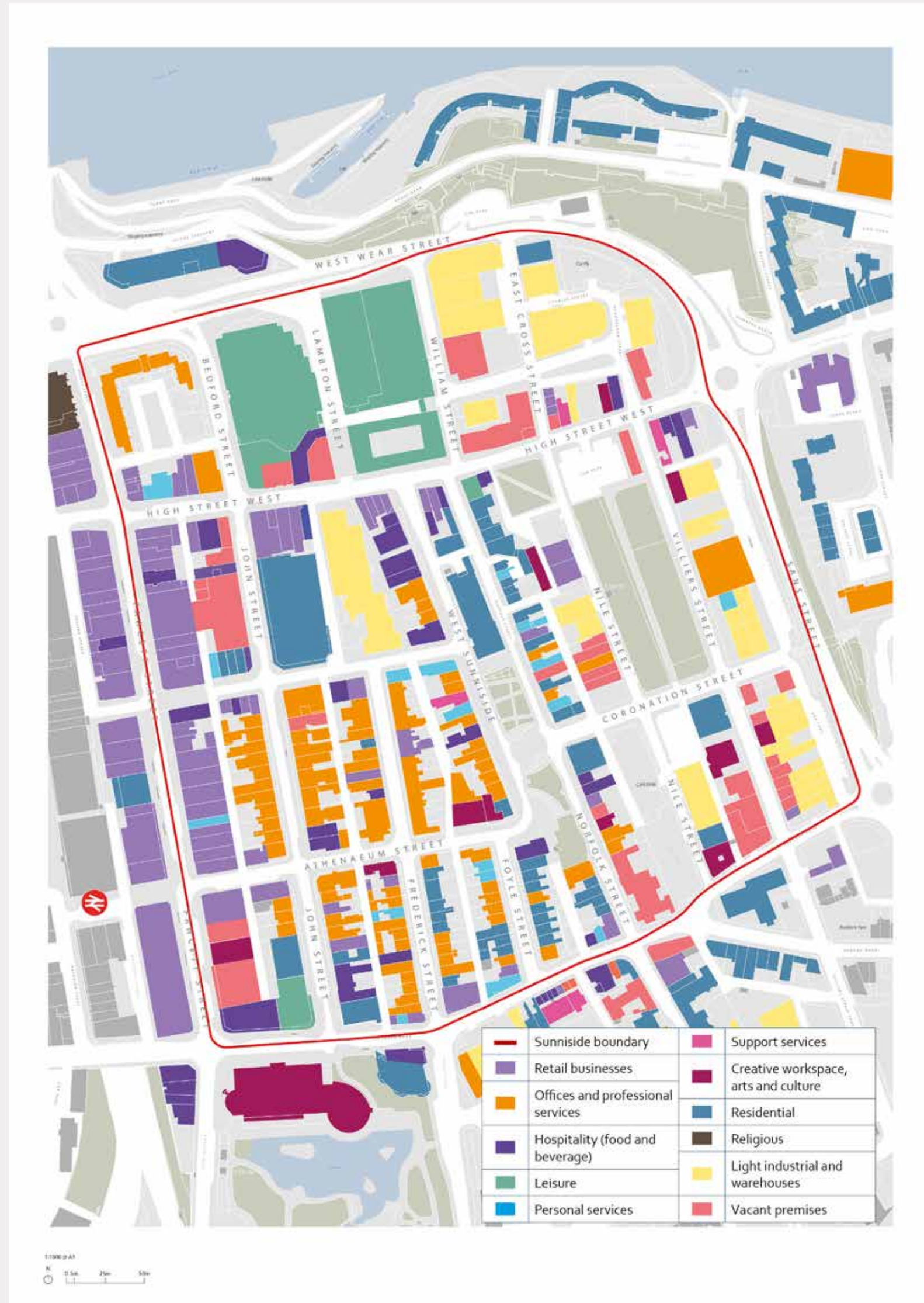
a serviced office building run by Adavo with 60+% occupancy; and

- Creo Communications on Foyle Street.

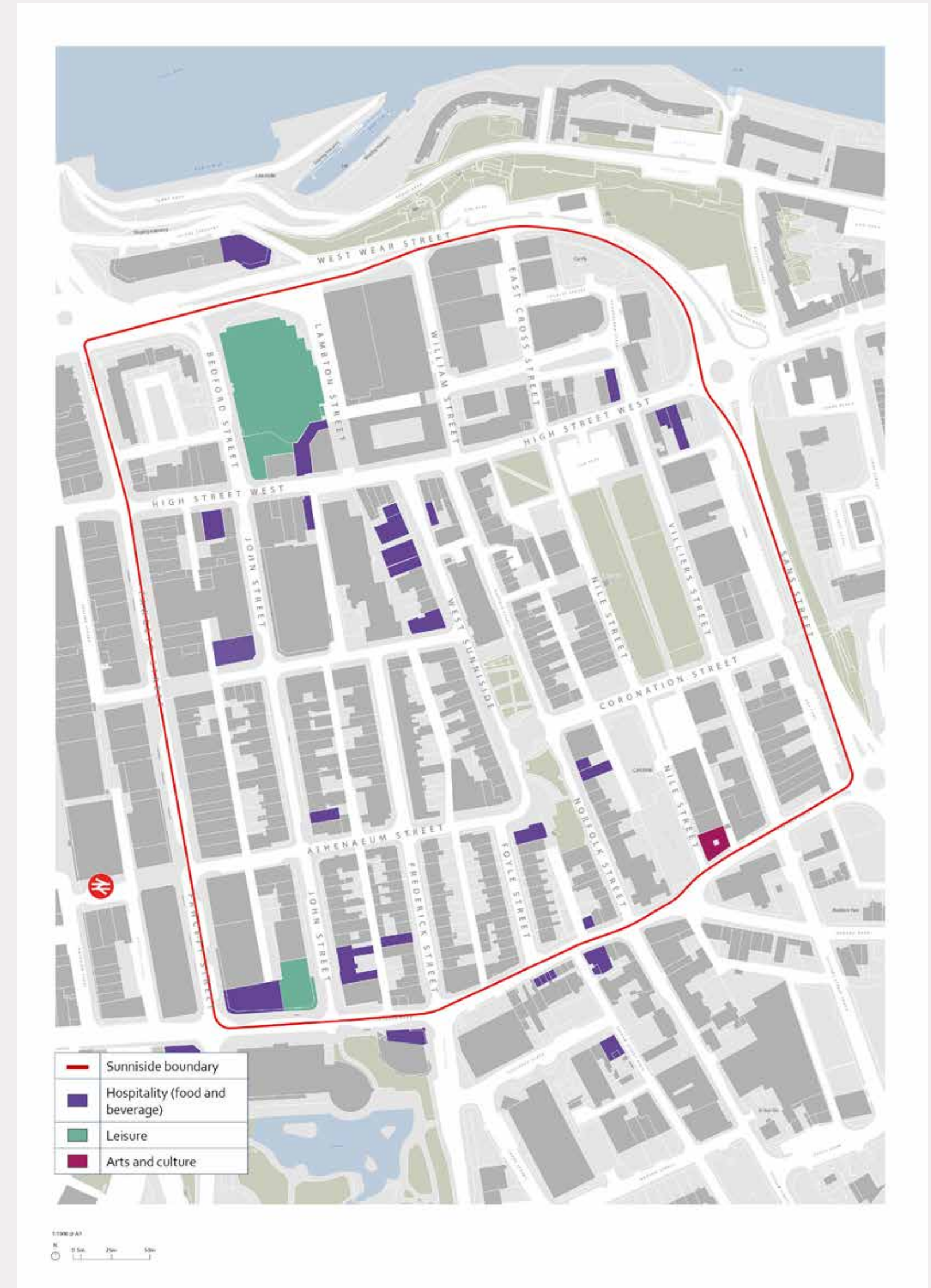
Spaces refurbished under the Heritage Action Zone have provided additional supply that is of excellent quality, setting a standard for Sunniside and drawing in tenants that recognise the role that quality plays in their business. Pop Recs, a successful business in Sunniside, have reported how important an affordable space has been to establishing their business. Affordability more generally is an important factor in retaining business activity in Sunniside: commercial properties on the Georgian streets of west Sunniside are mostly subdivided into floors and let as small-scale offices with agents reporting a key criteria that business rates are not payable. Grant support from the City Council has also played an important role in helping start-ups and social enterprises with limited capital to become established in Sunniside.

Creo Communications is a good example of how a start-up can grow within the streets of Sunniside. Starting out in the Sunderland Software Centre (Tavistock Place), they now occupy two buildings on Foyle Street and have invested in the area, purchasing property and renovating the buildings to a high standard.

The common characteristics of businesses succeeding in Sunniside are those placing quality at the heart of their business, building community around their offer and promoting their creative independence.



Land use in Sunnyside (based on ground floor use). The fine grained historic core of Sunnyside is home to the retail and service sector. East Sunnyside is characterised by larger light industrial uses, workshops and warehouses.



The evening economy night time economy in Sunnyside is limited and is focussed in 'West Sunnyside' with few business operating beyond 6pm (shown above).



Diego's bar is one of only two hospitality businesses onlooking Sunnyside Gardens that opens past 6pm



Events such as the Local Heroes North East pop-up food and drink market are a key driver of footfall in Sunnyside.

Connectivity and transport

Sunnyside is a centrally-located and very well-connected neighbourhood. It is easy to walk or cycle from anywhere in the neighbourhood to the retail core and National Rail/Metro station. There are good connections across the Wear Bridge on National Cycle Route 1 to the main University of Sunderland campus and onward to the north suburban seafront and beyond to Tyneside. The area is served by thirty six bus routes which connect Sunnyside with the rest of the city through to South Shields, Newcastle and Durham. The 700, 701 and 702 services which run every 30-40 minutes pass right through the heart of Sunnyside (stopping in Sunnyside Gardens) and connect Sunderland City Centre with the both University campuses and the Stadium of Light.

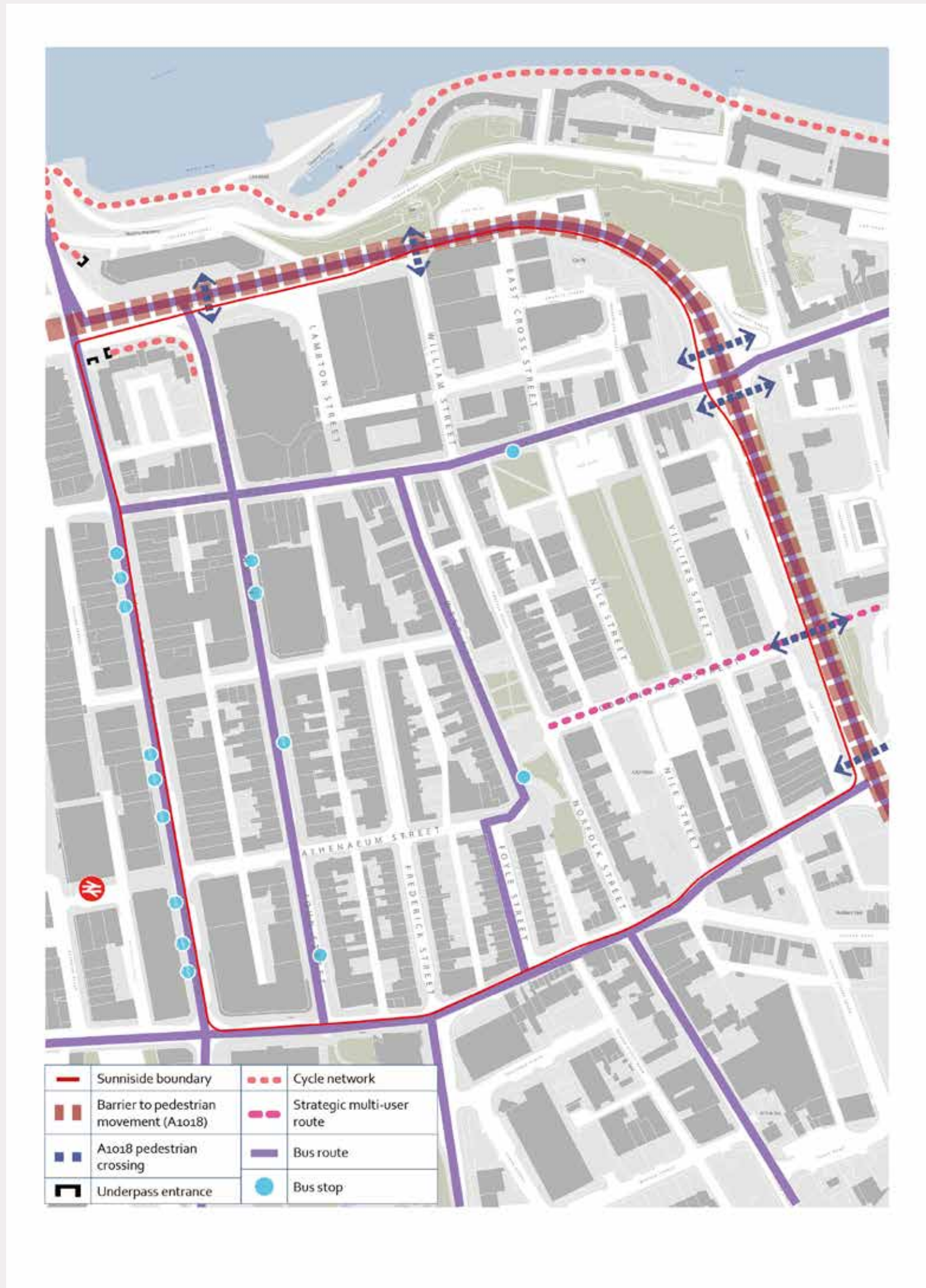
Vehicle access to Sunnyside is also straightforward via the A1018 ring road, which connects with High Street West and provides access to the Sunnyside multistorey car park as well as the neighbourhood street network. However, the

ring road also severs Sunnyside from East End and the Port of Sunderland to the east and the Wear to the north. A bridge provides east-west pedestrian access via Coronation Street but is widely perceived as unattractive and unsafe, and most other pedestrian and cycle crossings elsewhere are underpasses or not overlooked. The pedestrian environment of the A1018 itself is hostile, characterised by narrow or non-existent pavements and regular guard rails. There are poor public transport connections to the East End.

Like many UK cities, Sunderland has been at times bifurcated by car-oriented planning within urban areas as well as between them. The A1018 bounds Sunnyside to the north and east, cutting it off from the Riverside and East End. How could this be tamed, greened up and humanised whilst keeping its movement function?



The A1018 bounds Sunnyside to the north and east, cutting it off from the Riverside and East End.



Though Sunnyside is well connected by public transport, at a local level its cycle and pedestrian links to the north and east are limited and in need of improvement.



Sunderland city wide movement. Sunnyside is a short walk or cycle from key facilities including the train station, the university campuses and the Vaux neighbourhood.

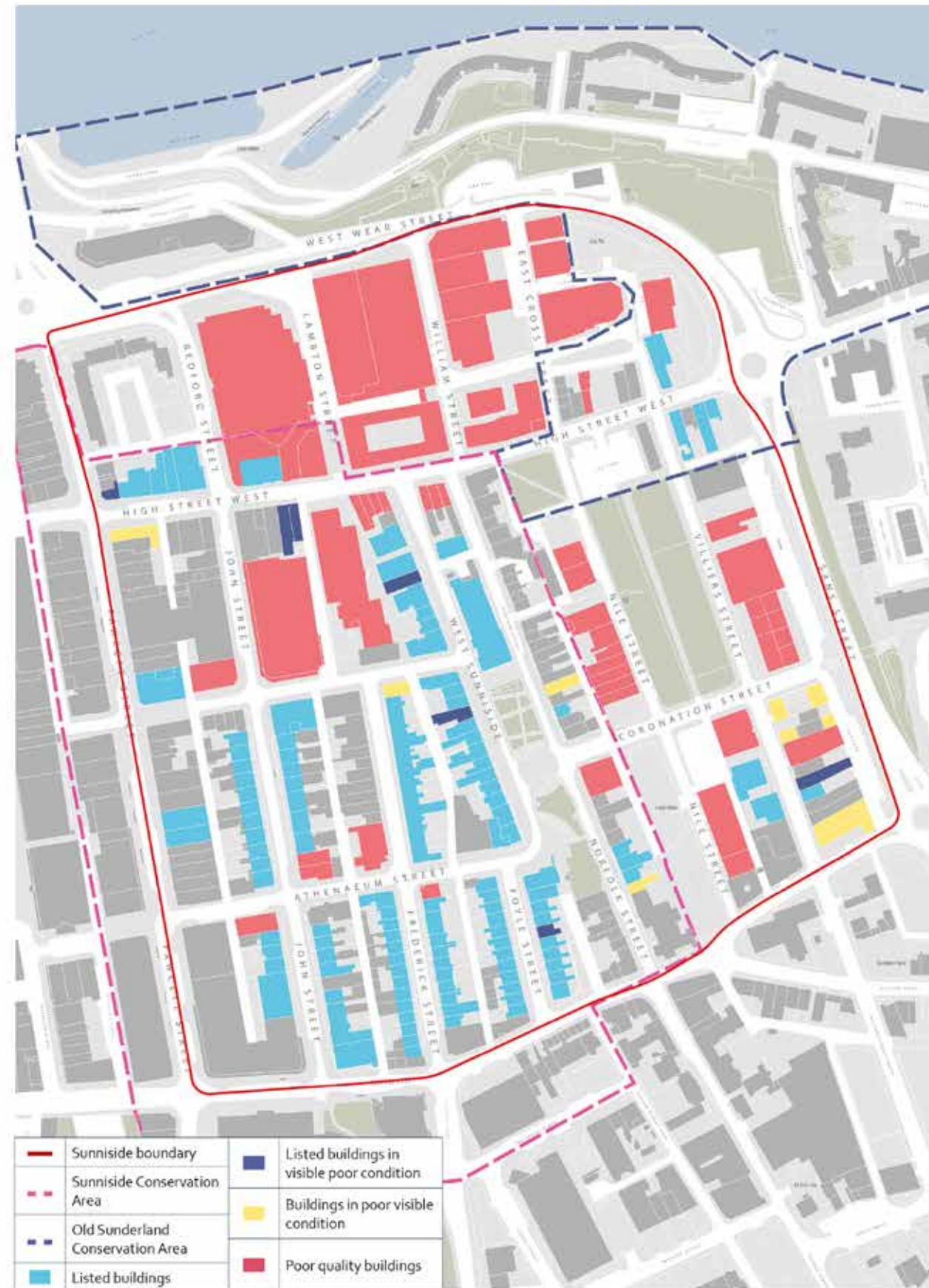
Urban character

Sunniside's character can be described in two halves:

- To the west, between Fawcett Street and Norfolk Street, a largely intact grid of streets of beautiful Georgian terraces form the Sunniside Conservation Area, which contains one hundred and thirty listed buildings many of which remain in good condition. Most of the buildings in this area of Sunniside are in office or commercial use, with some retail and hospitality at ground floor level and sporadic residential uses; and
- An area to the east which incorporates some of the Old Sunderland Conservation Area to its

north around High Street West but is otherwise a looser and more fragmented mix of light industrial buildings, heritage buildings some of which are in a poor state of repair, and vacant sites where buildings and in some areas entire streets have been demolished. The latter present several opportunity sites for future development.

Sunniside Gardens, the sole area of formal green space and non-street public realm, lies at the geographic centre of the neighbourhood and marks the notional boundary between the east and west character areas described above.



There is a clear east west split in the quality of streetscape and built form in Sunniside.



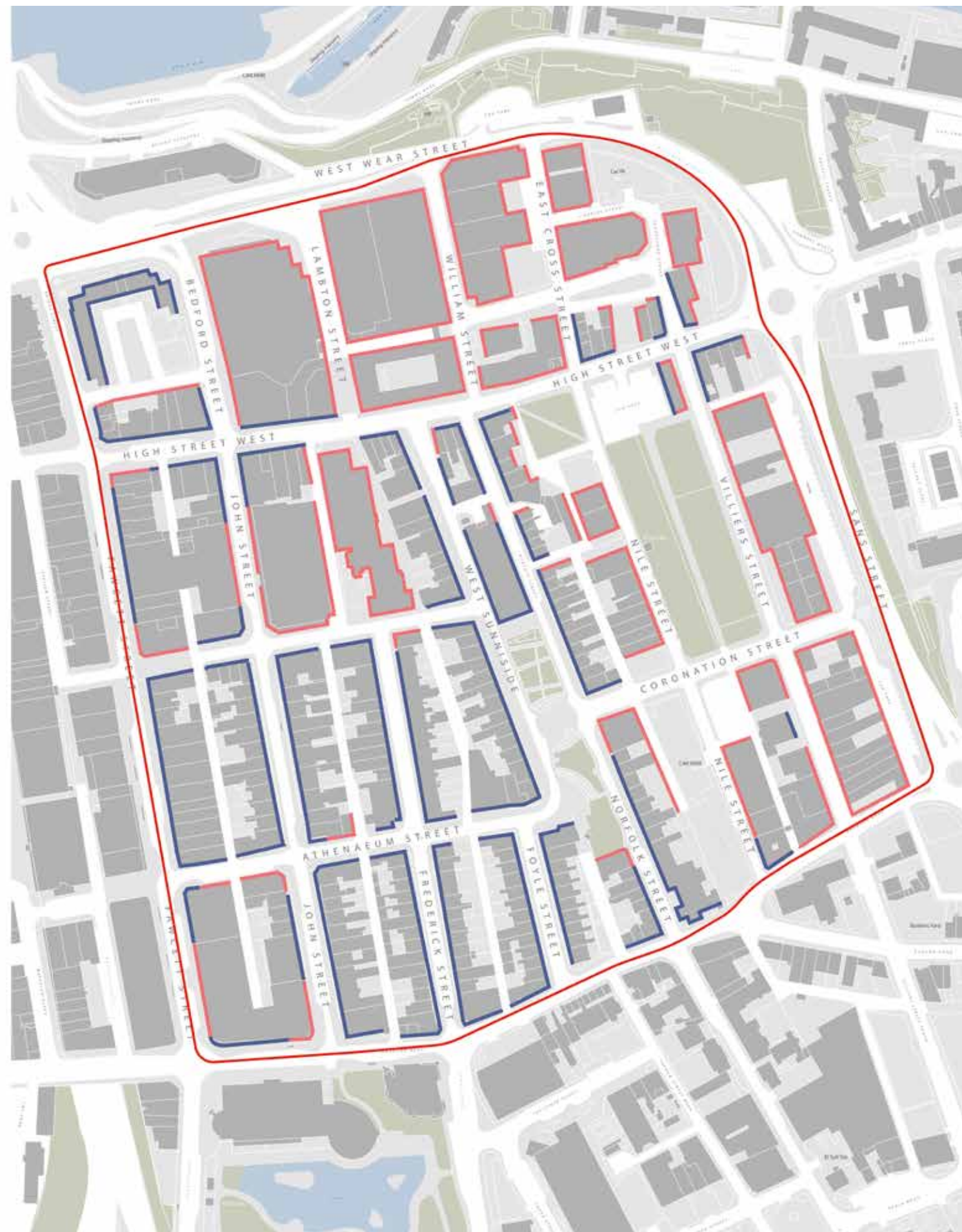
In Sunniside opportunity sites, inappropriate new development and historic assets sit side by side.

Activity

Everyone wants Sunnyside to be a vibrant, active urban neighbourhood. Two important indicators of vibrancy are:

- Building frontage – whether it presents active uses and entrances to the street or whether the frontage is ‘dead’ – blank, windowless, or shuttered; and
- Footfall – where and how many people typically move about on foot through the neighbourhood.

The map below shows a clear division in the activity of building fronts between the historic terraced streets of west Sunnyside and the more fragmented east Sunnyside where warehouses, garages and derelict buildings characterise the streetscape. Additionally, some buildings that are potentially ‘active’ in the sense of having front doors and windows to the street present as ‘dead’ because they are shuttered most of the time for security. The widespread use of security shutters is usually a signifier of high levels of crime or perceptions of crime.



Sunnyside dead v active frontages. There is a clear division between the historic terraced streets of West Sunnyside and the ‘shatter zone’ of east Sunnyside where warehouses, garages and derelict buildings characterise the streetscape.



Boarded up shops and vacant properties create a sense of degradation and detract from the appearance of Sunnyside’s grand historic streets.

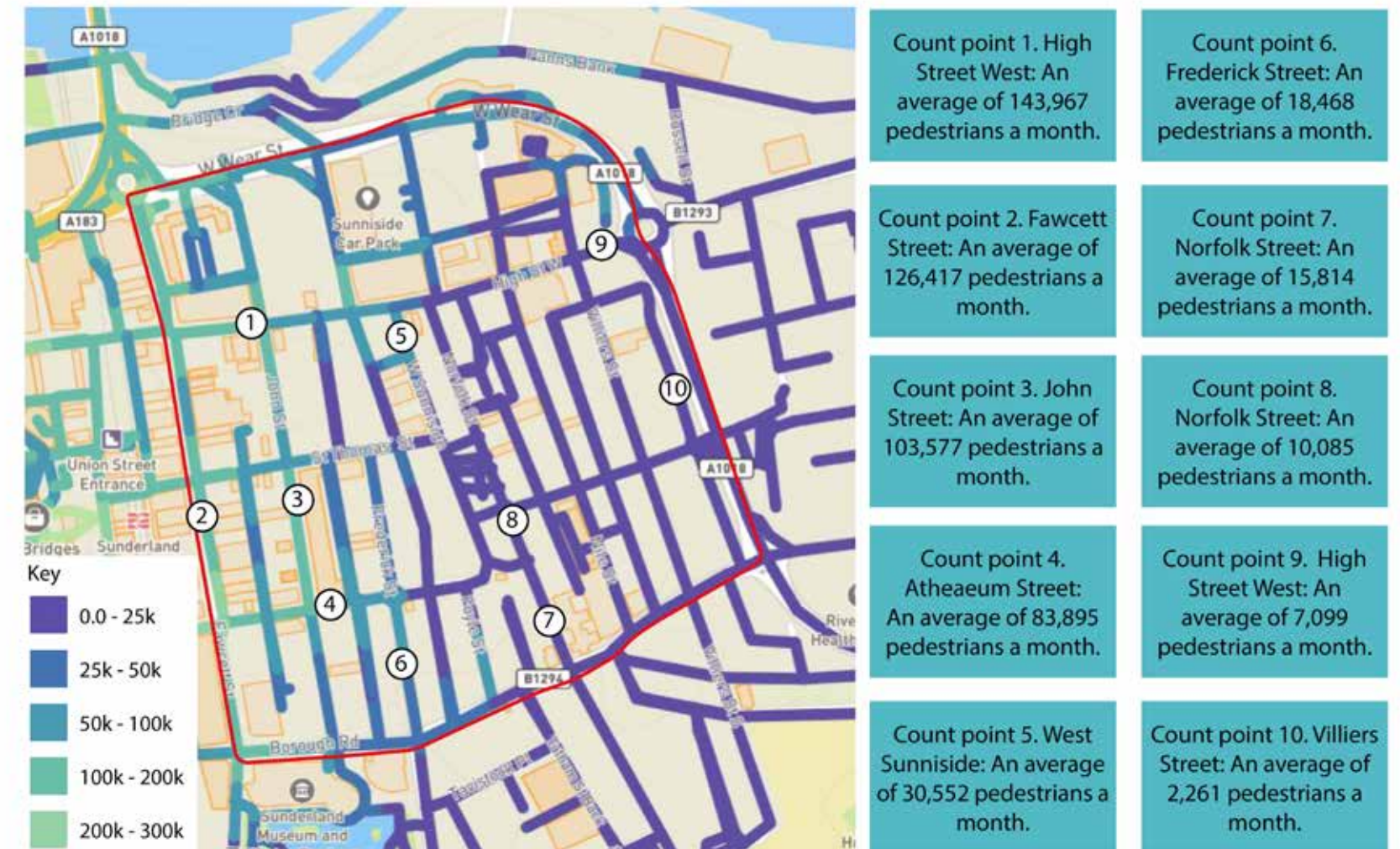
Footfall analysis tells a related story

- Unsurprisingly, the most-walked areas of the city centre are the Bridges shopping centre and the western part of High Street West – i.e. the prime retail area.
- Fawcett Street has only slightly lower footfall levels, but these drop off slightly east to John Street and then, east of John Street, there is a huge drop off. Pedestrian movements are 92% lower on Sunnside Gardens (an average of 10,085 pedestrians a month) than on Fawcett Street (an average of 126,417 pedestrians a month).
- Even around Sunnside Gardens there is a fall of nearly 50% between West Sunnside (an average of 30,552) and Norfolk Street (15,814) – and it is notable that Norfolk Street has higher footfall than Sunnside Gardens, which suggests people avoid crossing the square, making it a black hole for pedestrian activity.
- It is notable that footfall along Coronation Street, which connects via a pedestrian overbridge across the ring road to the East End, is no more active than other streets in east Sunnside, suggesting this link is scarcely used.

These locations are all within less than 400m of one another, which is approximately a 5-minute walk.

Lack of pedestrians does not always mean a business will not flourish. The average monthly pedestrian footfall outside PopRecs on the eastern end of High Street West is 7,099 yet the multi-use venue is one of the contemporary success stories of Sunnside. However, as a rule, businesses will locate where footfall is high, and pedestrians will gravitate where other pedestrians go.

There are a number of complex factors behind these footfall patterns, including that the urban environment in east Sunnside is not inviting to visitors, and that the absence of street life amplifies concerns about crime and anti-social behaviour. However, it should be noted that even if these problems could somehow be solved in isolation, the problem would remain that the eastern part of Sunnside is effectively a dead end, lacking permeability to the north and east and meaning it is not 'on the way' anywhere. This is not an insoluble problem but it means that a strategy to activate the area needs to consider how to locate more 'destination' uses in this part of the neighbourhood to draw people in, and emphasises the importance of the local residential economy – i.e. people who don't need the area to be 'on the way' because they already live there – to sustaining the vibrant Sunnside everyone wants to see.



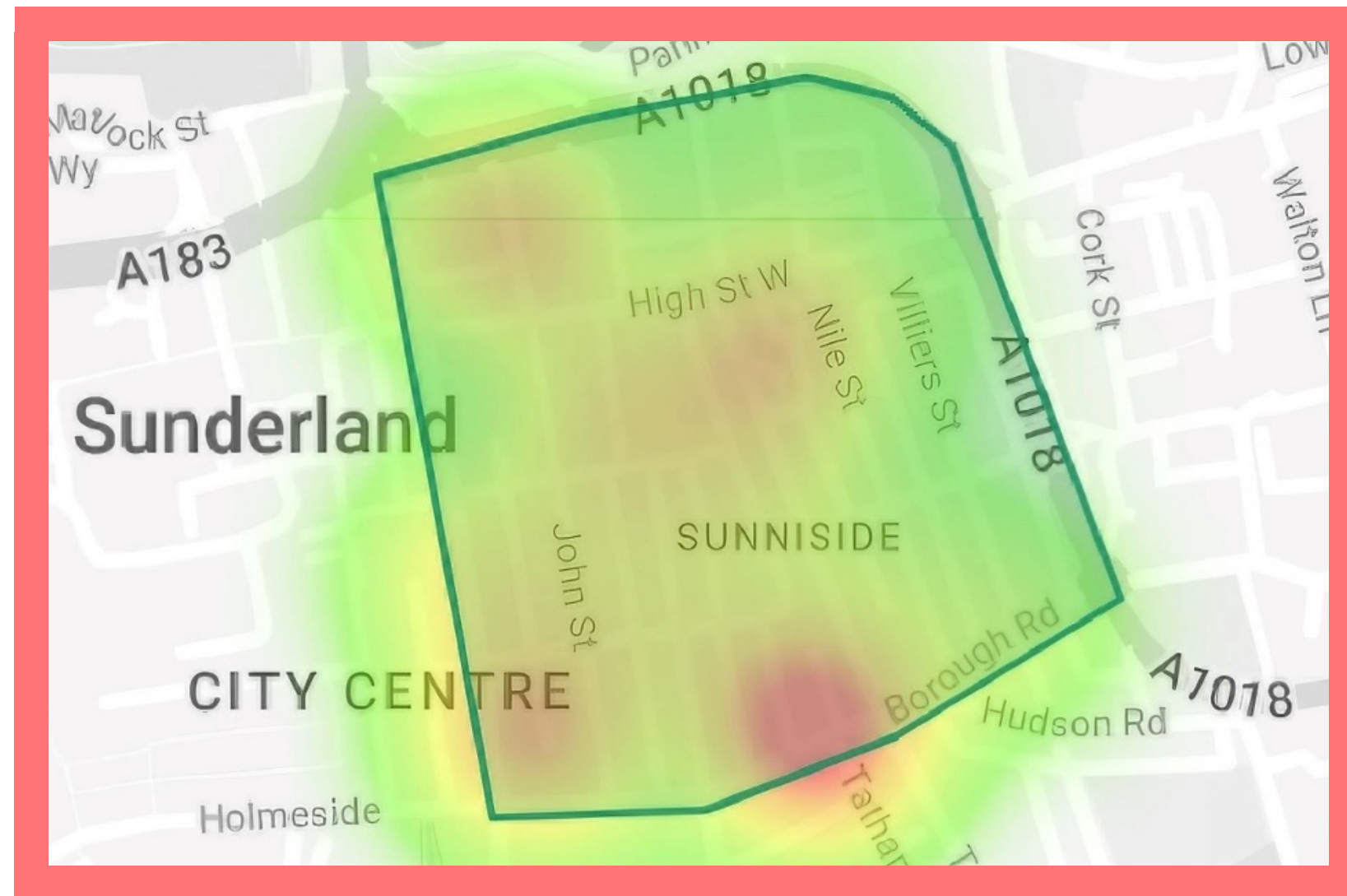
Average monthly footfall per fixed point location between August 2022 and January 2023.



An example of an active frontage with 'passive surveillance' in action, this is lacking on many of Sunnside's streets.

There are a number of complex factors behind these footfall patterns, including that the urban environment in east Sunnyside is not inviting to visitors, and that the absence of street life amplifies concerns about crime and anti-social behaviour. However, it should be noted that even if these problems could somehow be solved in isolation, the problem would remain that the eastern part of Sunnyside is effectively a dead end, lacking permeability to the north and east and meaning it is not 'on the way' anywhere.

Crime and anti-social behaviour



Sunniside Crime hotspots in 2022. Source Property Data 2023 based on data from police.uk



The former Travel Lodge is an area for congregation and anti-social behaviour

Unfortunately, Sunniside today is a high-crime area. And the prevalence of actual crime feeds a widespread perception of crime that hampers efforts to change the area and its reputation.

Sunderland has a crime rate that is 38% higher than the national average. Sunniside has a 'very high crime rate' at 2,165 per 1,000 residents compared to the national average of 75.8 per 1,000 - a phenomenon that partly reflects a small resident population, but also that Sunniside is indeed a particular focal point for anti-social behaviour, crime and substance abuse. Consultation and a survey with the community made it clear that very few people report low-level crime and anti-social behaviour - in the majority a result of fatigue and frustration at the lack of response from services. Yet there were 412 reported crime incidents in Sunniside between August 2022-January 2023 (the last six months

of available data). Of these incidents the top five crime types were:

- Anti-social behaviour – 131 offences (31.8% of all offences);
- Violence and sexual offences – 80 (19.4%);
- Shoplifting – 49 (11.9%);
- Public order – 42 (10.2%); and
- Burglary – 35 (8.5%).

The map below shows the top ten locations for reported crime in Sunniside against footfall data. The top three "hotspots" for crime were on or near Bedford Street (79 incidents), on or near Fawcett Street (79) and on or near Borough Road (62). Overall, the majority of crime is reported on the quieter streets with low pedestrian footfall with a particular concentration around Sunniside Gardens and the surrounding streets.



The top ten locations for reported crime incidents in Sunniside (between August 2022 and January 2023) overlain on a pedestrian footfall flow map (August 2022). The majority of crime is reported on the quieter streets with low pedestrian footfall with a particular concentration around Sunniside Gardens and the surrounding streets.



Tackling Anti social behaviour will be key to the success of this strategy.

Anti-social behaviour (ASB) is the most prevalent crime reported in Sunnyside accounting for 32% of all reported crime. ASB has loomed large in virtually every conversation the project team has had with residents, businesses, public bodies and other stakeholders about the future of Sunnyside. All respondents to a safety and security survey conducted in February 2023 said they experience ASB on a regular basis with 43% experiencing this 'most days' and 14% experiencing this 'multiple times a day'. Responses from business owners have also noted the prevalence of ASB incidents taking place during the summer months. This ranges from abusive and threatening behaviour to physical damage and vandalism with respondents stating they often witness ASB including "vomiting, physical bloody fights, screaming, swearing, smashing glass, damage to vehicles, and drug use." (Sunnyside business owner, February 2023).

There are other tangible effects of crime and ASB:

- Seven businesses spoken to by the project team reported an average cost [in the past year] of £9,785 to deal with the consequences of loss and damage as a result of break ins, theft and vandalism (e.g. replacing goods, repairing and securing properties), and several have suffered repeated break-ins over a short period; and
- Among business surveyed, average insurance costs have increased by 62% (£1,712 per annum) over the last five years and 29% of respondents had made insurance claims in the last two years as a result of break-ins, burglary and theft.

As well as their direct impacts and costs, crime and anti-social behaviour have an exhausting effect on businesses in Sunnyside, many of which already operate on tight or non-existent margins. There is a widespread view that tackling crime in Sunnyside is not a priority for the authorities: for example, that CCTV is not an effective deterrent because even where offenders are caught on CCTV, charges are often not brought. As well as deterring incomers, crime and ASB and the perceptions of them also prevent the area from making the most of what it already has: for example:

- Several professional services workers with offices in the Georgian streets said that they would rarely if ever go for a drink in the bars on West Sunnyside with colleagues after work

because of the expectation of hassle and the perception of unsafety on the streets, felt especially by women; and

- Some businesses involved in creative arts and making told us that even though they needed to get their products to market they would be reluctant to consider fronted, street-level premises in Sunnyside because of the crime and security risk.

Sunnyside is included in long-established Pubwatch and Shopwatch schemes which focus on reducing crime associated with retail and licensed premises. The Council employs neighbourhood wardens who can enforce environmental matters such as litter as well as anti-social behaviour but their resources are stretched across the city. Between October and March 2022, the Council funded additional private security guards (marshalls) to patrol the city centre and Sunnyside, providing a visible presence to deter crime and challenge instances of ASB although without the powers of the police for example to confiscate alcohol. Businesses in Sunnyside reported that the presence of marshalls helped deter crime but also highlighted the problem that antisocial behaviour is often simply chased around the neighbourhood.

The Sunderland Altogether Improving Lives (SAIL) Initiative is a city-centre based partnership between Sunderland City Council, support services, Sunderland Business Improvement District (BID) and Northumbria Police which provides targeted support for vulnerable users and those responsible for ASB. The project launched in December 2022 with the aim of 'working together for a safer, cleaner Sunderland' and collaboratively tackling issues of city centre safety, including the area of Sunnyside (2022-2025). As of March 2023, it provides for two additional community safety officers to follow-up community-based reports of ASB and crime on the ground. Though in its early stages, the SAIL initiative has already reported a positive impact with a 33% reduction in reports of antisocial behaviour and a 61% reduction in burglaries across the city centre.

Section 5

Future Sunnside:

Strengths, Weaknesses,

Opportunities and threats

Future Sunnyside

It is clear from all the analysis and consultation the project team has undertaken that there is a common view that the longstanding goal of re-establishing Sunnyside as a vibrant, mixed-use neighbourhood within the urban core remains as valid today as ever.

In this context, and based on the analysis of the preceding

sections, this section summarises Sunnyside's: Strengths and weaknesses – the positive and negative attributes of the area that provide the fundamental basis for considering future strategy and investment; Opportunities and threats – the investment, policy and market factors and decisions that will bear on outcomes.

Strengths

Sunnyside is well-located. The city centre and its jobs, amenities and transport links are close by and easily accessible by all forms of movement.

Sunnyside has much of the infrastructure of a mixed-use liveable neighbourhood. Sunnyside is home to a broad range of uses: residential, retail businesses, professional services, hospitality and leisure businesses, personal service businesses such as hair and beauty, creative workspaces, light industry uses such as car services and offices of third sector and support service organisations including probation services.

Sunnyside already has a strong community of entrepreneurs. There are a number of sectors that clearly have strong or emerging presence in the area. The breadth of the cultural and creative industries are represented, from individual artists to arts development agencies to creative commercial companies. The music industry, providing a network for music development and music experience with performance space, production facilities and rehearsal space. The social enterprise sector with a number of city-wide organisations operating from these streets as well as local businesses that show a dual commitment to their businesses and to the Sunnyside

community and showing their belief in the areas potential. The food & beverage and leisure also have a presence in the area with mostly independent businesses, although this sector struggles the most with the low footfall resulting from perceptions of the area. Many of these entrepreneurs have taken significant risks and/or invested heavily to build their businesses in the neighbourhood.

Sunnyside has the structure of a compact, walkable neighbourhood. Sunnyside Gardens, West Sunnyside and Norfolk Street form an obvious and natural focal place for the neighbourhood, and past investment in the public realm in this area is standing the test of time. The street grid is legible and easily navigable.

Sunnyside has a strong built character with distinct areas. The well-preserved Georgian streets of the west offer formal beauty, continuity with history and adaptability to changing use. The east is scruffier and more workaday but with a clear pattern, some landmark buildings and a strong sense of possibility as to what could be done with vacant plots and unused buildings.

Sunnyside is, in part, a dead end. The severance caused by the ring road reduces the need to pass through the eastern half of

Weaknesses

the neighbourhood and makes increasing footfall reliant on destination uses and local residential population. But most of the current destinations are along Fawcett Street and High Street West.

Sunnyside suffers from low demand. The residential population of Sunnyside is small and footfall from the rest of the city centre is limited, with little cross-pollination to the rest of the neighbourhood from anchors such as the cinema and casino. Many people living in and around Sunnyside have low incomes and those with more disposable income, including students, go elsewhere. Consumer-facing businesses, including hospitality businesses, operate on a shoestring and with limited opening hours. Business investment is low as there is little expectation of improved revenues or margins.

Sunnyside's evening economy is limited and the offer is unreliable. The evening economy includes leisure uses such as Sunderland Bowl and cinema, a dance school and a cluster of restaurants and bars on West Sunnyside, many of which operate with irregular business hours and do not open seven days a week.

In turn, much of Sunnyside is, or feels, underutilised and underoccupied. Sunnyside, especially the east, has a high proportion of vacant buildings and sites that it is not economic to bring into use. Many in-use buildings are under-occupied with workers or only in use part-time. Even where buildings are well-used they are often 'hidden' from the street because there is no signage or activity. Lots of buildings with street-frontage are shuttered when closed, and some important pedestrian routes are neglected and with poor quality frontages.

Sunnyside is seen as a neighbourhood for vulnerable people. There is a high proportion of adults with complex problems living in supported living and HMO accommodation clustered in the surrounding area and, within Sunnyside, a concentration of support services serving them and other users from across the city. This group are prominent users of the public realm including Sunnyside Gardens, and the housing market has, in part, evolved to serve their needs. Combined with

a lack of other population and footfall, the needs and behaviours of vulnerable adults are widely seen – including by the wider Sunnyside community – as symbiotic with the character and purpose of the neighbourhood.

Sunnyside lacks housing choice and quality. The majority of residential accommodation is Sunnyside is one-bed properties; some of it for students but predominantly in the private rented market where the combination of low capital values and high housing allowances makes renting to low-income or vulnerable tenants profitable. With exceptions, most new-build housing developed in the last 30 years has been of low quality and there is a complete absence of offer to families or even to younger and older people who might want to choose an urban neighbourhood lifestyle.

Crime and anti-social behaviour are a major deterrent to living, working, visiting and investing in Sunnyside. The area suffers from high levels of crime and ASB and is viewed by many as a place which is unsafe to visit, especially on an evening. The complex issues of security and safety are having a tangible impact on the quality of people's daily experiences and wider perceptions of Sunnyside. From stakeholder conversations, it is felt that until this issue is resolved, Sunnyside will be unable to move forward. It is evident there is an urgent need to actively manage these issues in the next 3-5 years.

Sunnyside is, currently, less than the sum of its parts. Despite having the 'bones' of a great place, its city centre location, beautiful historic streets and potential development sites, Sunnyside is not yet meeting its potential for the reasons outlined above. This masterplan will provide a coordinated, long-term strategy to address these issues and ensure this becomes a thriving neighbourhood.

Opportunities

Sunniside is well-placed to support and benefit from new investment and job creation in the city centre, and a growing student population. Attracting people and building demand is not just a hyper-local project for Sunniside but sits alongside a city-wide initiatives to build a revived customer-base and audience for the city centre.

The Riverside area to the north-west of Sunniside is a major focus of growth in the city centre and will deliver new employment opportunities and 1,000 new homes. In addition to this, quality student accommodation is projected to come forward in Sunniside and is anticipated that many of these residents will be mature students with families or international students. This level of growth in the local area has the potential to boost the demand for activity, numbers of customers and the footfall in the area.

Business and sector networks are already forming in Sunniside around the cultural, creative, social and leisure sectors. Though many of these businesses are taking risks investing in the area, they recognise the potential of the area and have a determination to positively shape the future of Sunniside. These networks have the potential to enable further growth through collaboration, building supply chains and providing opportunities. Supported appropriately, this could have a significant impact on the use of Sunniside and strategic moves should be made to facilitate their strengthening through collaboration between businesses, the council and the Sunderland BID.

There is unmet demand for affordable workspace. Existing business incubator workspace in the area are well used and running to capacity, MBC Wellbeing providing accommodation to over 50 artists and the re-furbished Wear Commissioner's Building (opened 2020) is building occupancy, currently running at 60%+. For creative, music and social enterprises to establish themselves in Sunniside and grow, these businesses need access to well-supported and affordable workspaces on flexible terms. There are businesses and start-ups are looking to locate in Sunniside if and when the right space becomes available.

Recent experience shows that where quality is offered, people will come to Sunniside. Despite the challenging perceptions of the area, there is evident continued demand for good services in Sunniside whether for leisure or work, where there is a quality offer. A survey of Poprecs customers showed they have a loyal customer base who come to Sunniside from far and wide.

The scale and causes of the crime and anti-social behaviour problems in Sunniside are being grasped. There is recognition that managing the serious challenges of ASB and crime in the area is fundamental to addressing the problem of low demand and the poor perception of Sunniside and the wider city centre. There is an urgent need to actively manage these issues in the next 3-5 years and any efforts to encourage footfall and activation in Sunniside must be accompanied with a programme of works to sustainably change the problem of ASB and crime.

Sunniside Gardens has the potential to be the focal place for a thriving, sustainable neighbourhood. Sitting between 'east' and 'west' Sunniside, the Gardens should be Sunniside's 'village green', though the space is currently poorly activated, there is potential to create and strengthen the recreation offer and increase footfall through year-round, coordinated event programming and activation of vacant and underused properties.

The Council is intervening to stabilise the property market and secure future investment opportunities. Key assets, such as the former Joplings building and Sunniside Leisure (among others) which have the potential to transform the fortunes of Sunniside have recently come under council ownership. This ensures that any interventions on these sites will be in line with the masterplan's vision and removes the risk of these sites being developed in a manner which exacerbates existing issues. This level of investment is evidence of Sunderland Council's commitment to the long-term success of Sunniside.

There is plenty of room for development and growth. Sunniside does not lack space or opportunity sites (see opportunities map below), there are many vacant and underused physical assets which have the potential to be brought into active and productive use in the short, medium and long term to contribute to the development of a thriving and attractive neighbourhood.

There is a wave of current and planned investment in Sunniside. There are ten projects within the masterplan boundary that are already in the process of development for creative, community and commercial uses including key sites such as The Place, Tyre Shop, 15/16 Nile and Villiers and Norfolk House. There are a further fourteen project sites that are earmarked for development including the Peter Smith Antiques building, Sunniside Leisure, Nile and Villiers and Joplings House. When mapped with each other there are several focal areas of activity (see map on next page) that a strategy should capitalise on, ensuring these investments drive footfall throughout Sunniside and / or bring an uplift in residential, worker or visitor population.





Consultation has shown that here are numerous investments either recently completed, in progress or planned across Sunnyside. When mapped, these show several key areas of activity that are opportunities for activation, population and footfall.



15 and 16 Nile Street will be brought back to life as live-work studios for artists and makers.



A vision for Nile and Villiers produced during a feasibility study. The project has secured funding and will be on site soon, delivering high quality new homes and catalysing further growth.

Threats

Perceptions of Sunnyside are deep-seated and may be difficult to change. Sunnyside is understandably, seen by some as a place that is unsafe and not somewhere in which you would want to spend time or money and these perceptions will not change overnight. It is important that stakeholders see that these concerns are recognised and that strategies will be put in place to address these.

Without policy intervention, continued housing market failure is a major risk. Development alone will not resolve Sunnyside's issues, success is dependent on a holistic strategy which includes key strategic policy interventions at the local and potentially national scale that would help create an environment that is attractive to investment, residents and businesses.

There is a risk of fatigue if sustained progress isn't made. There is a sense among stakeholders that though plans have been drawn up, consultations taken place and some investment has taken place this has resulted in little tangible benefit to the area. Individuals have made huge efforts to improve their businesses with tried and tested methods. Collectively, people have embarked on marketing campaigns and joint working to build customers. Progress has been limited. Though this is a long term strategy and broader change will not happen overnight, the confidence of stakeholders in the potential of Sunnyside needs to be restored through quick wins which support and contribute to the long term ambitions for the area. Regular project progress updates will also be essential to developing stakeholder confidence in the project. There is a deficit of day-to-day governance and management capacity to unite the Sunnyside community and align everyone behind clear goals. There are no shortage of ideas, plans and ambitions for Sunnyside, what is currently lacking is coordination and an agreed vision between stakeholders for the area. The masterplan will go some way to rectify this but regular dialogue and transparency between stakeholders throughout the process is essential.

There is a need to sustain strategic direction and investment over the long-term. Sustaining this repopulation will require the coordinated management of existing challenges and good leadership to sustain the change in the long term. There is a need to establish a stewardship model that supports and empowers local agencies and actors to deliver change and target investment in the area beyond the timeframe of this commission.

There is a need to sustain strategic direction and investment over the long-term. Building the population and sustaining this change will require the coordinated management of existing challenges and good leadership.

Section 6

Objectives for a masterplan

**The delivery of
this masterplan
will achieve the
strategic objectives
of Sunderland City
Council, in particular
the objectives of the
City Plan, Local Plan,
Healthy City Plan and
Housing Eco System.**

Needs analysis

From the beginning of the masterplanning process, we gathered intelligence from the community, studied data and spoke to many people as we analysed the strength, weaknesses, opportunities and threats to Sunnyside.

This has helped us to better understand this area of Sunderland and what is needed so we can develop a strategy that responds uniquely to Sunnyside.

- Increased awareness and understanding of where Sunnyside is and the positive activity that happens there.
- Increased demand for property, services and wares.
- Increase concentration of residential retail, leisure and employment uses.
- Improved support and accommodation that currently leads to an unhealthy neighbourhood for vulnerable people.
- Management of ASB and Crime to allow footfall to increase and repopulation to take place.
- Reduction of crime that enables businesses to remain operational and viable in Sunnyside.
- An action plan that drives long-term change but begins at pace.
- Long-term coordination between stakeholders in the neighbourhood which drives the action plan.

Meeting Strategic Objectives

The delivery of this masterplan will achieve the strategic objectives of Sunderland City Council, in particular the objectives of the City Plan, Local Plan, Healthy City Plan and Housing Eco System. We have synthesized the relevant objectives in these strategic documents with the needs analysis concluded from this place analysis to define three summary objectives for the purpose of directing the development of a masterplan strategy.

Repopulate

To repopulate Sunnyside by encouraging reuse and redevelopment that improves residential quality and helps make a neighbourhood that people choose to live and work in for the long term.

Reposition

To improve the diversity of the area so that it becomes a liveable neighbourhood for all, providing amenities and services for a broader demographic mix of household types, sizes, ages and incomes that live in and visit Sunnyside making it work for everyone's sense of security, health and wellbeing.

Resilience

To enable a resilient neighbourhood sustaining existing and new businesses and amenities, providing long-term stewardship to improve environmental quality, provide services to support healthy and well communities and reduce crime and anti-social behaviour including through continued multi-agency and cross-sector co-operation.

Section 7

Next steps

Developing a Strategy for Long-term Sustainable Change

We will use this understanding and analysis of needs in Sunnyside to develop a strategy for change that is deliverable and sustainable. It will seek to build on the unique strengths of the Sunnyside, address the challenges for and within the area, utilise the breadth of opportunities found in the social, economic and built environments of Sunnyside and seek to proactively mitigate risks to investment and secure the benefits that investment will bring.

Developing a Ten-year Action and Delivery Plan

This strategy for change will be delivered through actions: these will be interventions, capital projects, programmes, policy change and strategies, all working towards realising this vision of Sunnyside. Working with stakeholders in Sunnyside and the City of Sunderland, we have already mapped the actions currently planned within the area that will contribute to delivering this vision.

We will now form working groups with stakeholders to look across this action plan to:

1. Identify further actions that will support or amplify these projects or meet gaps that other stakeholders won't be able to address;
2. Identify further actions that will mitigate risks that have been identified in the Place Analysis Report as halting progress in Sunnyside;
3. Identify partners or stakeholders that will be best placed to develop and deliver these actions.

This extended list of actions will then be appraised and prioritized within working groups to establish the deliverability of these, including strategic fit, fundability, value for money, phasing and management.

The outcome in July 2023 will be an implementation plan; a programme of action for sustainable change in Sunnyside.

TOWN X Create Streets

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Evidence base -

Socio-economic analysis

Sunderland
City Council

TOWN.


CREATE
streets


Department for Levelling Up,
Housing & Communities

[sunnisidesunderland.com](https://www.sunnisidesunderland.com)