

GREATER MANCHESTER ECONOMY, BUSINESS GROWTH AND SKILLS OVERVIEW & SCRUTINY COMMITTEE

DATE: 11 March 2022

SUBJECT: Three Year International & Marketing Programme (2021-2023)

REPORT OF: Councillor Elise Wilson, Portfolio Lead for Business & Economy

PURPOSE OF REPORT

To provide Overview & Scrutiny members with an update for Year 1 of the Growth Company's (GC) 3-year International & Marketing Programme focussed on Investment and Tourist attraction activity via MIDAS and Marketing Manchester (MM) services. This report highlights progress and achievements of the programme since the last report on 12 March 2021 and provides an outline of key strategic priorities for Year 2, 2022/23.

This International & Marketing Programme report includes the following sections:

1. Introduction & Strategic Context
2. Supporting Delivery of GM's Strategies – Programme Success Measures
3. Programme Objectives, Deliverables & Governance
4. Year 1 Programme Performance to Q3 (Apr 21 - Dec 21)
5. Future Delivery - 2022/23 Objectives & Actions

RECOMMENDATIONS

Committee members are asked to;

- Note and comment on the report
- Endorse the Programme and Outcomes

CONTACT OFFICERS

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The programme of work undertaken supports GMCA and LEP in tackling inequalities and encouraging economic growth by championing diversity, inclusion and equal opportunities and new outcome measures to be added.

EQUALITIES IMPACT, CARBON AND SUSTAINABILITY ASSESSMENT:

GC is committed to putting equality, diversity and inclusion at the heart of its services. The activities which are updated upon within this report are delivered with the recognition of the importance of supporting a diverse range of businesses and individuals across Greater Manchester and providing equal opportunities for all. Programmes are designed and monitored for Equality, Diversity and Inclusion (EDI). GC is committed to delivering 10 EDI pledges, as published on its website, and our Equality, Diversity and Inclusion Lead is currently supporting the recruitment of key EDI roles within GC, including working with our Social Value Lead and the chair of the African Business Forum to identify better ways to support African business owners in GM.

GC also supports and delivers services which contribute towards GM's ambition to achieve carbon neutral living in the city-region by 2038. This includes specific projects such as the Low Carbon programme and the newly launched online platform beenetzero.co.uk alongside the LEP, for businesses to access advice, support and funding on their journey to reducing carbon emissions. GC also provides a focused development programme for the Low Carbon and Environmental Goods and Services sectors. **The Growth Company will move from its current position of Carbon Neutral to scope 1 & 2 with gold standard offset to Net Zero (Scope 1-3) with residual GHG offset through neutralisation measures in line SBTi guidance by 2035.**

The 'Green' Economy is addressed specifically under this programme which aims to:

- Increase awareness of GMCA and GM LEP's role in encouraging work to address, and mitigate against, the impact of climate change. It promotes GM's low carbon sector credentials and champions measures that will enable GM to achieve its ambition of carbon neutrality by 2038.
- Directly focus on the attraction of companies that are specialists in low carbon technologies, or in the encouragement of companies to invest in net zero facilities in GM.
- Include the development and attraction of events and conferences that promote GM's ambitions and stimulate interest in and economic benefit to GM and its climate change agenda.

Risk Management:

N/A

Legal Considerations:

N/A

Financial Consequences – Revenue:

N/A

Financial Consequences – Capital:

N/A

Number of attachments to the report:

0 – Annex 1 included in body of report

Comments/recommendations from Overview & Scrutiny Committee

N/A

1. Introduction & Strategic Context

In March 2021, Committee members were provided with a paper outlining the GM Business Rates Funded 3 Year International & Marketing Programme, a programme led by The Growth Company (GC) and delivered by its MIDAS (inward investment) and Marketing Manchester (promotion & tourism) services

This report provides Overview & Scrutiny Members with an update for Year 1 of the programme, (April '21 – March '22), highlighting progress and achievements since the last report and provides an outline of key strategic priorities moving forward. These strategic priorities deliver against the ambitions of the GMS, GM's International Strategy, Economic Vision, the LIS, and the 5 Year Environment Plan, all with core theme of providing inclusive and environmentally sustainable growth.

This report reflects priorities within the existing GMS, first published in 2017 and further supplemented in 2020 by the 'Living With Covid Resilience Plan', and the GM International Strategy 2017 – 2020.

Both the GMS and GM International Strategy have recently been refreshed, and therefore the priorities of the Year 2 International & Marketing Programme have adapted to changes in priorities, as well as taking account of the improving operational environment in terms of Covid.

The Plan also takes into consideration the challenges of global uncertainty and the need to remain flexible to adapt to changes during the year.

Inward Investment & Tourism Contribution to GM Economy

Place promotion, both domestic and international, and the attraction of inward investment, business events and tourism all contribute significantly to GM's economy. A summary of this contribution is set out below:

- Tourism contributes £9 billion in visitor spend to the GM economy (including £904 million from The Conference, Business Visits and Events sector) and supports 100,700 jobs -
- Foreign Direct Investment (FDI) company stock is worth £37 billion and 172,000 jobs to the GM economy.

GM Local Authorities provide funding to promote and attract investment and visitors, delivered via Growth Company service areas of MIDAS (£1m p.a.) and MM (£377k p.a.). GMCA agreed an additional 3-year (21/22-23/24) funding allocation of £2.25million to maintain and strengthen this activity during a period of rapid market evolution and recovery, in part stemming from a post-Brexit and 'living with Covid-19' world. This income is supplemented by private and other partner income resulting in annual budget for 21/22 for MM and MIDAS of £2.3 million and £2 million respectively (whilst noting current volatility due to Covid).

Both MIDAS and MM's service delivery performance for 2017-20 was independently evaluated in 2020 by HatchRegeneris, showing a combined ROI of £140 per £1 spend and included the following highlights (full report is available).

MIDAS

- On average MIDAS has supported the creation of 3,900 new jobs and 900 safeguarded jobs from 75 projects per annum over the last 3 years (2017 – 2020).

- The net additional economic value of this investment (i.e. as a direct result of MIDAS' intervention) has been calculated as 3,200 jobs; £189m in GVA; £5m in additional business rates generated; and a further £71m of private sector capex investment facilitated
- This results in an ROI of £1:160 for MIDAS (noting that this does not include wider partner resources expended).

Marketing Manchester

- Marketing Manchester generates £395m p.a. in visitor spend and net additional economic value of £80m, supporting 1,500 jobs for GM.
- Delivers ROI on GMCA funding of 20:1 for domestic and 10:1 for international campaigns.
- Leverages £6m from the private sector to promote GM, therefore creates a higher return to GM, resulting in £110 return per £1 of GMCA funding

2. Supporting Delivery of GM's Strategies – Programme Success Measures

The above GM strategies are directly supported via this Programme through an enhanced set of added value KPIs developed in March 2021. These align to GM priorities stated above, with increased emphasis on quality, low carbon, innovation and wider value (inclusivity and sustainability) reflecting GM's desire to "do things differently". Full KPIs are set out in Annex 1.

These success measures are progressive in their international respective marketplaces of inward investment, promotion and tourism and aim to put GM at the forefront of a more inclusive and purpose-led approach to economic growth. This also reflects that Covid has stimulated a much deeper and wider debate around 'purpose' of organisations and businesses (especially climate change and inclusivity) combining people-planet-prosperity agendas for which GM has a notable position. This approach therefore not only reflects doing the right thing but also has the potential to enhance GM's competitiveness in these markets.

3. Programme Objectives, Deliverables & Governance

The programme objectives are to significantly contribute to GM's Vision, GM's post-Covid recovery plan and Internationalisation Strategy. In addition to regular performance reporting, the programme will be independently evaluated at its conclusion in 2024.

Programme Objectives

The programme forms part of the GC Business Plan and is also encompassed in its Business Plan Strategic Objectives, ensuring focus and wider delivery support for the programme:

- 1. Work with GMCA and partners to deliver the new GM International Strategy,** the GM LEP's Economic Vision, and ambitions of the LIS and GMS by promoting

GM's frontier sectors (health innovation, advanced materials, creative/digital/tech, and low carbon).

2. **Delivery of LIS aligned targeted inward investment activity**, underpinned by strong analytics, to increase the volume and value of foreign direct investment and high value jobs for GM residents and reflecting Covid-19 related restrictions.
3. **Provide leadership, insight, marketing and communications to the GM Tourism, Hospitality & Leisure sector** to support and recover the value and volume of the sector and economic impact and jobs for GM, recognising the potential ongoing Covid-19 restrictions.
4. **Manage the GM Convention Bureau & Sports Bidding Unit**, aiming to recover and support the Business Conferences & Sporting events sector and deliver the GM Business Tourism Strategy through marketing, researching, and bidding for national and international conferences, noting the continuation of Covid-19 restrictions.

Programme Deliverables: Taking these 4 objectives forward will be enabled by the delivery of:

- **Amplifying GM's narrative and Global Brand** amongst target audiences, media, influencers, and decision makers in a number of highly globally competitive marketplaces.
- **Building domestic and global influence** through international networks, city to city and cluster to cluster partnerships, that enhance GM's profile, whilst sharing best practice, innovation, investment, trade and talent.
- **Promote transformational sectors:** Health Innovation and Care; Advanced Materials; Digital & Creative Industries and the Low Carbon sector to a wider domestic and international audience, raising GM's profile globally in these distinct specialisms, a critical part of cluster development.
- **Attracting inward investment** into these sectors, that enhances growth, creates good and high value jobs, transfers innovation and new technologies, stimulates productivity growth and ultimately, GVA.
- **Improved Key account management** of large and foreign-owned firms in GM, that reduces flight/shrinkage risk, identify growth opportunities, increasing universities relationships, skills development, digital transformation, supply chain resilience, carbon reduction, and encouraging better employment practices (Mayor's Employment Charter).
- **Support international route development** alongside Manchester Airport (noting Covid-19 restrictions) that increases connectivity, business investment, international trade, visitors and international students.
- **Attract large-scale events and conferences** within the specific LIS sectors and wider cultural strengths such as sport, and purpose-based themes, that help to enhance GM's place-offer and reputation in these areas, whilst bringing in high-value visitor spend into the city region.
- **Attract tourists** that bring direct visitor spend into the GM economy, stimulating demand in the visitor, cultural, retail and hospitality sector, a key inclusive employer in the foundation economy, allowing investment in skills and the digitalisation of the industry which increases productivity and value.

- **Support Strategic Place development through international benchmarking** and market feedback, we can assess GM's global competitiveness through data and external perceptions, using this feedback to support "product" or place develop in GM as well as performance tracking over time.

Governance

Programme performance is reported and assessed via:

- Quarterly report to the GMCA Growth Board
- Quarterly reports to the International Marketing Advisory Board (with LEP, CA reps)
- Growth Company's internal reporting to its Board
- End of Programme Independent Evaluation

4. Year 1 Programme Performance to Q3 (Apr 21 - Dec 21)

The following section summarises Year 1 performance up to Q3 with the full KPI table including core and value-added targets in Annex 1 and the inward investment and promotional delivery outcomes by Local Authority are in Annex 2.

4.1 MIDAS Inward Investment Performance Summary

Tracking the recovery over the first 3 quarters:

2020/21 concluded with 55 successful investment projects, and 1,952 new jobs created from inward investment. Compared to the previous financial year, 2019/20, this represented a fall in project wins of 31% and fall in job creation of 44% due to the overall impacts of the Covid-19 pandemic.

A recovery from the pandemic started during the final quarter of 2020/21, with project intake increasing every month during that final quarter. This was the longest succession of month on month increases in over a decade.

In April 2021, the start of the current financial year, project intake rose to its highest level since the beginning of the pandemic and by the end of Q1 quarterly project intake had increased consecutively in Q4 2020/21 and Q1 2021/22. In fact, project intake in Q1 2021/22 was the highest since the start of the pandemic, rebounding to the same levels experienced in Q1 2019/20. Associated jobs, however, returned to relatively subdued levels following a bumper final quarter in 2020/21.

However, project successes and related job creation were still relatively modest in Q1 with the closure of 11 projects, with 272 new jobs created, although this was still 83% more projects and 59% more jobs than the same quarter last year during the first wave of the pandemic. While the number of successful projects had returned to levels typically seen in the first quarter (12 successes in Q1 2018/19 and Q1 2019/20), job creation remained lower (442 job creations in Q1 2018/19, 727 in Q1 2019/20).

Q2 saw an improvement in performance in both project successes and job creation, with 15 projects, and 1,655 new associated jobs (the strongest Q2 on record for job creation). Combined with a strong first quarter, the mid-year position was 26 project wins with 1,930 job creations, the latter figure almost matching the figure for the whole of the previous year.

This was a firm recovery close to the mid-year pre-pandemic average of 30 project wins and 1,150 job creations, however, we saw the first decline in new projects coming into the pipeline for over 6 months, with 71 additional projects identified (compared to 99 in Q1). Corresponding job additions also declined for the second consecutive quarter, with 2,461 additions (2,949 in Q1) showing that the investment environment was still somewhat unpredictable and unstable despite positive signs of recovery.

At the half year mark, the investment pipeline had seen 170 new projects added, with 5,410 corresponding jobs. This was below the pre-pandemic mid-year average of 182 project additions with 6,742 jobs. At this point, 158 projects had declared that they been delayed because of pandemic since it started in March 2020. Of these projects, 14 had closed successfully during that period, 55 had closed unsuccessfully and 89 were still open. Analysis suggested that as of the end of Q2, successful projects that were due to close last year but were delayed by Covid accounted for approximately 13% of project wins and 20% of job creations showing that part of the recovery was definitely due to the backlog of projects beginning to work through the system.

By the end of Q3, there were 44 projects and 4,619 jobs created, the latter being a record for MIDAS within a full financial year and this has put GM firmly on course for a record year.

MIDAS Core 21/22 KPI Performance Summary End of Q3

Job Performance	21/22 Target	YTD	%
Jobs Created	2000	4,619	231%
Jobs Safeguarded	1000	842	84%

Project Performance	Target	YTD	%
Projects Won	50	44	88%

FDI Performance	Target	YTD	%
Jobs Created	1200	2,645	220%
Project Successes	30	34	113%

Analysis of YTD Performance to Q3:

Prior to COVID-19, new investors typically accounted for 52% of project successes. This dropped to 38% last year, but at the end of Q3 this year, they had rebounded to 47% of project wins and 45% of job creations. Prior to COVID-19, foreign investors typically accounted for 67% of project successes. This increased to 76% last year. At the end of Q3 this year, foreign investors accounted for 78% of project wins and 59% of job creations.

The following table summarises outcomes by FDI and UK investment as well as new business and expansions, across pre-Covid, mid-pandemic last year and year to date performance:

	FDI		UK	
	New Investment	Expansion Project	New Investment	Expansion Project

Pre-Covid	50%	50%	60%	40%
Last FY	29%	71%	69%	31%
This YTD	43%	57%	64%	36%

In terms of LIS sectors, the largest sector for project wins has been Advanced Manufacturing, with many of these projects having been expansions, with much of the account management focus during lockdown coming to fruition. Across the service sectors, the majority of job creation has come from digital roles, whether they are in the vertical of creative, digital and tech, or related to digital transformation across sectors such as financial and professional services as well as life sciences and healthcare (digital health).

Analysis of the current pipeline suggests 25-30 projects and 540-740 jobs could still close in the remainder of the year (Q4). It is important to remember that the final quarter typically sees project close dates revised to the next financial year, so the above projections may not be fully realised.

MIDAS “Value-Added” KPI Performance to End Q3 (See appendix 1 for full table)

MIDAS surveys clients via an evaluation form upon a successful outcome including traditional outputs such as job numbers, and quality of service provided, but now also related to the new “value added” KPIs such as whether projects are HQs or R&D or low carbon focused, as well as rating the influence that MIDAS has had on the project locating or expanding in GM.

In Q3, over 23% of successful projects reported as being HQs (target of 10%), with over 18% R&D oriented, and 20% low carbon related (target of 10%). 51% of jobs were considered “high-value” (>£35k salary) and 99% of jobs created were over the living wage, with 98% of jobs within LIS frontier sectors. There had also been 143 apprenticeships identified by companies within the 44 successful projects to date, against a target of 65.

The new target that has proven more challenging is around % of “high-quality” companies attracted, not because those 44 companies are not necessarily “high-quality” or “good” employers, but more because it is difficult to define and accredit this - a methodology for this is being developed.

Inward Investment Highlights for 2021/22

- A number of very large tech project wins including PwC’s new UK Tech Centre (1,000 jobs); and a number of UK HQs such as Cloud Imperium’s new UK HQ (700 jobs); Awaze UK HQ (100 jobs) and Castore Global HQ (300 jobs).
- Significant successes with public sector/Whitehall relocations creating over 1,000 new jobs overall, despite a challenging political environment, securing large scale investment from BEIS (low carbon team), Home Office, and DCMS as well as NDPBs/Agencies such as BDUK, CMA.
- AMPI bid won in Rochdale, with MIDAS supporting NPL, private sector and RDA over the last 2 years to develop concept to bid stage working closely with UoM and GMCA as well.
- Significant support to get Northern Gateway (Bury/Rochdale major employment site) recognised by DIT/Central Government as a premier UK site for Advanced

Manufacturing for transformational FDI projects looking at the UK – with a number of significant projects currently considering the site as a result

- Supporting Innovation GM’s development, particularly focussing on building new investable propositions (low carbon active transport hub in Tameside; HPOs and Hydrogen Fuel Cell Centre with MMU) adding innovation projects (including AMPI, project Grove and project Lighthouse) to the IGM pipeline and continuing to develop the Innovate Manchester programme through Orphan IP research.
- Work with Findexable to get Manchester recognised as the leading regional hub for Fintech, and one of the most significant in Europe, backed up by a strong lead generation campaign and recognised by the City of London.
- New “HPO” proposition developed for Healthy Ageing and Diagnostics – in line with the LIS - which will be adopted as a national proposition by DIT, based on research commissioned by MIDAS and undertaken by Ageing Analytics.
- Mayoral presence at the Global Investment Summit, organized by No 10 and DIT, with the GM Mayor centre stage on Levelling up and very senior meetings with Capital and Corporate Investors at CEX level.
- Succession of digital lead generation campaigns delivered with media/industry partners through Covid, such as ‘Manchester: The City to Scale campaign’, targeting high growth e-commerce companies in particular; fintech, low carbon, cyber and low carbon campaigns which have fed the project pipeline consistently.
- Supporting important private sector networks such as the Advanced Manufacturing Forum and Northern Tech Council, which have included work on skills and supply chain development, working jointly with GMCA and wider stakeholders.

4.2 MM Performance Summary: Destination Marketing & Promotion

MM Core KPI Performance Summary (full list in Annex 1)

MM’s KPIs changed at the start of the programme to reflect MM’s widened role to support GM’s recovery focussing on local confidence building as well as recovering domestically and nationally, increased global competition and Brexit challenges with a reduced resource base.

Q3 cumulative KPI targets were all met or exceeded, particularly high performing included:

- Promotional campaigns generated **27.8million consumer engagements** – including targeted local campaigns, adapted to respond to the unlocking of restrictions.
- Media coverage generated **600million ‘Opportunities to See’**
- Conference won delivered **economic impact of £5.6million.**

The Convention Bureau’s Q3 achievements included submitting 30 conference and sports event bids and winning 10 with a potential economic impact of £14 million. The Sports Bidding Unit continued to perform well with 2 bids submitted worth a combined economic impact of £73m including a bid that is through to Round 2 with a decision expected in January 2022.

Added value KPIs were also agreed at the start of the programme to reflect delivery of GM's ambition to be a greener, more inclusive fairer region and MM's KPIs evolved to:

- **Align more closely to and deliver against GM's Recovery plans, GMLEP's Economic Vision, LIS, and 5 Year Environment Plan** by promoting, communicating and delivering events for GM's wider themes including equality and inclusivity as well as green growth, digital and innovation – 18 events focussed on GM's priority sectors/themes were delivered attracting 1237 delegates
- **Widen the scope of Convention Bureau** to target and bid for conferences & events in GM's wider themes of equality and sustainability – 3 of the annual target of 30 conference bids to date were equality / sustainability themed
- **Strengthen local partner relationships, engage and encourage MM partners to be fairer, greener and prosperous** businesses - MM signposted partners to GM initiatives and 17% of our partners have signed GM initiatives inc Mayoral Good Employment Charter
- **Strengthen national relationships and continue to input strategically into the national agenda including** development of the UK's Tourism Recovery Strategy and DMO strategic review – representations made including Visit Britain/ VisitEngland, DCMS, BVE Partnership, Tourism Alliance, Core Cities, UKH and ACE.

MM Performance/Activity Highlights

- Campaign & Comms Activity included:
 - **Tourism recovery campaigns:** Summer in the City and #HereforCulture achieved 86m impressions and 633,000 web visits; "Buzzing to be back", a return to the office campaign achieved reach of 1.2m including 295k film views.
 - **Sector campaigns:** Digital in our DNA (reach OTS 7m, 591k digital impressions); Powering Innovation (reach OTS 1.7m print and digital 1.8m); and Greener GM Campaign, media partnership with edie.net and other coverage reach OTS 2.2m
 - **Media visits and coverage** included: Manchester named 3rd Best City in the World by Time out Magazine, MM took a concerted effort to boost index via partners. Coverage highlights included a Manchester city guide in The Belfast Telegraph (OTS 28k), two hotel features in the Times (OTS 15m), and pickup of the 2022 annual press listing by The Manc (OTS 49k).
- Support to GMCA and the GM LEP included the following activity:
 - Development of 2022-25 International Strategy, approved in Jan, March launch
 - White paper Material Gains: Building Better Cities for People and the Planet was featured in Engineering and Technology Magazine website, receives 1.5m visitors pa and shared with 70k subscribers of their daily newsletter.
 - Video content created & distributed in conjunction with Salford City Council, University of Salford and Peel, celebrating the first 10 years for MediaCity.
 - Four B2B sector films created and used as part of campaigns across green, digital, innovation and tourism

- Conservative Party conference engagement including partner event at KPMG, Levelling up video and social media, 495 new twitter followers YTD (+18.3%), 1361 new LinkedIn Followers (+176%)
- Comms, content and events delivered in the lead up to COP26, working with GMCA including The North West Green Zone delivered in Manchester, and the International Mayor’s event in Glasgow during COP 26.
- Hosted UK Inbound Convention in Manchester, 200 inbound travel trade/tour operators
- Developed Irish relationships including Irish Embassy event in London with Consul General of Ireland to discuss future joint working and plan for the Mayoral Visit to Ireland in March 2022.
- Tourism Talent Hub gained momentum and achieved: 226 businesses engaged, 105 businesses assisted (21/22 target 60), 149 clients placed in work (21/22 target 100)

Impact on GM’s Tourism & Hospitality Sector

International and domestic leisure and business tourism were hit early and hard by Covid-19, however, as restrictions were removed, domestic leisure visitors were the strongest performing market: higher spending corporate and international markets have yet to make full recovery and are predicted to take until 2023/24 to fully return.

2021 has provided an improvement on the overall 2020 performance. However, business levels remain significantly lower than pre-pandemic levels and the journey to recovery for Greater Manchester has some way to go. City-Region destinations such as GM that rely heavily on international, business and events tourism continued to struggle, with many coastal and rural areas faring better than cities, demonstrated by drastically reduced hotel occupancy due to continuous business closures across the majority of leisure and all business venues.

Annual Occupancy Performance

Greater Manchester				Manchester City Centre			
	Occupancy	ADR	RevPAR		Occupancy	ADR	RevPAR
2021	47%	£69	£38		46%	£80	£43
2020*	37%	£59	£24		36%	£64	£26
2019	80%	£75	£60		81%	£84	£69

SOURCE: STR. REPLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR IS STRICTLY PROHIBITED.

Whilst data is yet to be finalised for 2021, VisitBritain has run forecast models which predict the UK-wide performance in 2021 for both inbound and domestic markets:

Domestic tourism: The central scenario forecast for 2021 is for a recovery to £56.2bn in domestic tourism spending in Britain in 2021; this is up 65% compared to 2020 but

still only 61% of the level of spending seen in 2019. The forecast predicts £16bn in domestic overnight tourism spending (64% growth on 2020 and 65% of the 2019 level) and £41bn in leisure day trip spending (69% growth on 2020 and 61% of the 2019 level).

International visitors: The central scenario for inbound tourism for the full year 2021 is for 7.7 million visits, a 31% decline on 2020 and 19% of the 2019 level; and £6.9 billion to be spent by inbound tourists, representing growth of 11% on 2020 although still only 24% of the 2019 level. The increase in spend in 2021, despite the fall in visits, is driven by the large increase in spend per visit, a result of a much higher average length of stay.

Supporting GM's Recovery

Domestic tourism has restarted first and has helped to mitigate the impact on jobs and businesses. Many of GM's high value markets (corporate business, conferences, city leisure breaks and international visitors) have been the slowest to return and have seen re-opening in a stop-start fashion as restrictions were lifted. At the same time, GM's global competitor destinations (which were already better resourced to attract these markets) have been fighting for market share, compounded by impacts of anticipated visitor restrictions due to UK's transition out of the EU. On a positive note leisure tourism businesses have reported pent-up demand from advance cultural bookings and accommodation enquiries.

MM supported the recovery of the Tourism Hospitality & Leisure sector:

- **Confidence Building Campaigns** - MM initially restored confidence, support businesses and coordinated partners via evidence-led promotions targeted at the local GM audience, remaining flexible to continuously adapt and re-plan to respond to government restrictions before focussing on regional, national then international markets via B2B and B2C campaigns. Several campaigns were delivered in 2021 as restrictions lifted through the year including: Summer in the City; #HereforCulture achieved 86m impressions and 633,000 web visits; "Buzzing to be back", a return to the office campaign achieved reach of 1.2m including 295k film views.
- **Supporting product development** – we continued to deliver VisitBritain's Discover England Funded programme, working with suppliers and 3rd party tour operators (operating with a 9-12 month lead-in period) to include products in future promotions. As well as reinitiating existing product, this will include GM's new product that has continued to be improved: 7,000 new bedrooms are planned; and several major attractions are due to open in GM in 2021 including the new RHS Bridgewater, redeveloped Jewish Museum, Exhibition Hall at the Science & Industry Museum and new Asian Gallery at Manchester Museum. Followed by the major opening of the Factory in 2022/23 and the Coop Live Arena in 2023/4 (will be the largest arena in the UK)
- **Influencing National Tourism Policy** – we focussed on raising the profile of GM and influencing national Tourism policy with DCMS and national tourism organisations including the development of the National Tourism Recovery Plan and the strategic review of DMOs for the benefit of GM and the UK.

- **Conference pipeline development & bidding** – focus on building back the business conference pipeline, bidding and account management to ensure that postponed events were rearranged in GM and the pipeline was rebuilt for future years
- **Align tourism and culture** - promoting the vitality of the city region, creating a compelling narrative which makes GM attractive to investors and students as well as visitors.

5. Future Delivery - 2022/23 Objectives & Actions

The following objectives and actions have been set for Year 2 of the Programme, 2022/23 and are included in GC's business plan (objectives GM11-14) under the strategic priority: "To lead the delivery of the GM Internationalisation Strategy". GC is also currently working with GMCA to develop the Delivery Plan for the new International Strategy.

International Objective 1 (GM11) - *Work with GMCA and partners to deliver the new GM International Strategy, the GM LEP's Economic Vision, and ambitions of the LIS and GMS by promoting GM's frontier sectors (health innovation, advanced materials, creative / digital /tech, and low carbon).*

Actions

- Develop and deliver comms plan to promote GM Economic Vision themes and the refreshed LIS priority sectors via content curation & comms, including 3 wider thematic campaigns (innovation, digital and green) and seek new content funding opportunities
- Establish GM benchmarks for International Strategy priorities, and to supplement performance measurement of investor and visitor markets for MIDAS/MM to measure GM performance. Deliver the benchmarking action plan, reporting back to IMAB in May 2022 on progress
- Develop and deliver a growth Commercial Partnership Strategy building on existing THL, MIPIM and Green partnerships, adding new. Deliver annual THL annual partner engagement & events programme to retain and acquire partners.
- Deliver a programme of analytics-led business development activity to attract inward investment into Greater Manchester.
- Sustain and further develop international partnerships such as the Manchester China Forum and Manchester India Partnership, building on initial work of Japan steering group and a potential US Forum.
- Re-establish partnership relationships and promotion to win back confidence in key international markets and key sectors and continuing to review and mitigate risks and maximise opportunities re Brexit transition.
- Deliver online platform, marketing campaign to promote MM's Partnership offer
- Work with the GM Foundation Steering Group to identify support activity, secure funding, and support implementation
- Enhance Zoho CRM to further develop reporting and digital dashboard across MM's channels and audiences
- Develop strategy and action plan for the development of destination websites

International Strategic Priority 2 (GM12) - *Delivery of LIS aligned targeted inward investment activity, underpinned by strong analytics, to increase the volume and value of foreign direct investment and high value jobs for GM residents and reflecting Covid-19 related restrictions.*

Actions:

- Continue to build on campaign delivery in Y2 of the Digital in Our DNA, Powering Innovation and Greener GM campaigns, taking the reach +14m global audience
- Work alongside the LIS refresh to ensure frontier sector value propositions are up to date and develop new propositions where new areas of focus emerge.
- Develop investable propositions for strategic initiatives e.g. IGM & Net Zero 2038.
- Further develop analytics capabilities both to continually improve MIS for stakeholder management (CRM) as well as company analytics tools
- Develop a strong pipeline of investment opportunities through significant new business development activity and business engagement, both digital and physical, focussed on “value add” targets around R&D, low carbon etc
- Deliver the strategic account management of 325 companies (which includes the DIT KAM contract), focussing on attracting reinvestment in areas such as low carbon (including decarbonisation of GM sites), R&D and high-value activity
- Review and deliver the Innovate Manchester Programme – jointly with the BGH - innovation opportunities between large/foreign-owned firms and GM SMEs.
- Work with DIT to review and develop HPOs where GM may have nationally significant propositions (e.g., light-weight materials)
- Continue to work with Places for Growth to attract public sector relocations into GM, with an emphasis on those departments that are strategically aligned with the LIS or have wider strategic benefit to GM – e.g., DCMS.
- Grow the MIDAS Partnership to increase income that in turn grows the overall budget for investment attraction.
- Work with DIT to identify further opportunities for joint working and integration, such as the KAM programme, in addition to increasing GM’s profile within national investment promotion campaigns such as Great.
- Work with GM stakeholders and DIT to devise an appropriate method/ mechanism to attract further capital investment into GM.

International Strategic Priority 3 (GM13) - *Provide leadership, insight, marketing and communications to the GM Tourism, Hospitality & Leisure sector to support and recover the value and volume of the sector and economic impact and jobs for GM, recognising the potential ongoing Covid-19 restrictions.*

Actions:

- Influence national partners, to deliver the National Tourism Recovery Strategy and the implementation of the de Bois strategic review of DMOs.
- Explore commercial partnerships with VB and MAG to enable leverage from 3rd party partners to maximise reach.

- Produce programme of research and insights to inform the GM Tourism industry, including Business Barometer and visitor research.
- Develop approach and deliver programme of research to assess GM performance of visitors, conference organisers & delegates and MM's performance from perspective of partners, visitors and conference organisers.
- Reinstate existing, and develop new, city to city strategic partnerships, aligned to GM & Visit Britain priorities including New York City partnership and Ireland.
- Re-Initiate the Visitor Pass and implement.
- Deliver Tourism, Hospitality & Leisure (incl sport & culture) Covid recovery marketing and communications plans that deliver £6m Economic benefit, reach of 2.65m and OTS of 300m, generating leverage of 1:1
- Work with the travel trade in-market to grow back passenger numbers and increase the number of international passengers arriving at Manchester Airport.
- Continue work with BGH to deliver targeted support for businesses in the GM Tourism, Hospitality & Leisure sector in response to Covid-19 and recovery.
- Work with GMCA and BGH to assess potential to develop MM as a wider sector development organisation for THL
- Drive new Social Value outcomes in THL sector and promotion activity and encourage sign up to GM initiatives.
- Assess feasibility of a GM Tourism Conference incl launch Tourism Strategy, either as stand-alone or within Place events programme

International Strategic Priority 4 (GM14) - *Manage the GM Convention Bureau, aiming to recover and support the Business Conferences & Sporting events sector and deliver the GM Business Tourism Strategy through marketing, researching, and bidding for national and international conferences, noting the continuation of Covid-19 restrictions.*

Actions:

- Continue to review and deliver promotion of GM as a place to host business visits and events in line with government restrictions via targeted activity in collaboration with Visit Britain national team and GM convention partners
- Manage sports events bidding function and pipeline to deliver SLA KPIs.
- Research and develop pipeline of 40 conference bids targeting priority sectors aiming to convert over 30% of bids to wins delivering £15m economic impact.
- Research 3 inclusive/green conference opportunities to bid (GMCA added value)

Annex 1. MIDAS & MM KPI Performance April – Dec 2021

Output	20/21	21/22 target yr 1	21/22 to date Q3	22/23 target yr 2	23/24 target yr 3	3-year total	Rationale / Comments
MIDAS Core KPIs							
Increased GVA	N/A	£125m	£292m	£142m	£158m	£425m	This is expected GVA based on 5-year average, pro-rata for job numbers
Jobs created	4,000	2,000	4,589	2,250	2,500	6,750	
Jobs Safeguarded	1,000	1,000	843	1,000	1,000	3,000	
Projects	90	50	44	55	60	165	
Additional Business Rates Generated	N/A	£2.6m	N/A	£2.9m	£3.2m	£8.7m	Based on GM averages
% of UK FDI	N/A	5%	N/A	5.25%	5.5%	5.5%	Currently 5%
MIDAS Value Added KPIs							
Strategic Alignment							
%/No of R&D Projects (value)	N/A	5 (10%)	8 (18%)	7 (12.5%)	9 (15%)	21 (12.7%)	10% successes in last 5 years
%/No of Low Carbon Projects	N/A	5 (10%)	9 (20%)	5	5	15	No previous metric to compare to
%/No of HQs	N/A	5 (10%)	10 (23%)	(10%)	(10%)	16 (10%)	10% successes in last 5 years
People/Inclusive Value							
% of high value jobs (>£30k)	N/A	1,200 60%	51%	1,463 65%	1,750 70%	4,413	Typically, 60% of jobs are above average salary Median wage is £29k, mean is £34k
% of jobs over living wage	N/A	90%	99%	90%	90%	90%	
% of jobs in LIS sectors (incl FPBS)	N/A	90%	98%	90%	90%	90%	Included FPBS in LIS as it is an enabling sector. 10% would include foundation jobs in logistics etc.
No of apprenticeships	N/A	65	143	75	80	220	We've averaged about 125 a year, so can expect around half of that next year
% of high-quality companies (e.g. signed up to UN/Mayoral Charter or similar)	N/A	25%	5%	27%	30%	28%	
Reach/Influence							
Value Add - Ave client rating of MIDAS influence (New Projects)	N/A	4.0	4.2	4.1	4.2	4.2	
Companies Account Managed	N/A	250	174 met	250	250	250	

Output	20/21 Pre Covid target	21/22 target yr 1	21/22 to date Q3	22/23 target yr 2	23/24 target yr 3	3-year total	Rationale / Comments
MM Core KPIs							
No of conference bids	85	40	30	50	76	166	Yr 1 expects Q2/3 closures. Initial 3 year target 153 bids, annual target of 51 - revised 3 year target is 166, annual target of 55. Based on uncertainty of conference rotations and reduced staffing levels and current capacity. If staffing increases, then targets will be amended.
No of conferences won	30 won	15 won	10	17won	20 won	52 won	
Economic impact for GM	£30m	£12m	£14m	£15m	£25m	£52m	
Media engagement, number of journalists and influencers with significant interaction	125	125	113	135	145	405	Hosting media visits, virtual interaction and online meet the media events.
Media coverage OTS (Opportunities to see)	900m	400m	600m	600m	900m	1.9b	Y1 target set with what expect to achieve due to restrictions on hosting physical media visits to GM and coverage.
Of which, media coverage OTS of target sectors	9.5m	9.5m	41m	12m	15m	37m	OTS, Opportunities to See is the measure for media coverage
Social media engagements	19m	14m	18m	17m	19m	50m	
Of which, no. of social media engagements in target sectors	1.5m	1.5m	1.5m	2m	2.5m	6m	
No. of unique visitors to destination websites	3m	2.05m	3m	2.25m	2.45m	6.75m	Includes Visit, Meet, Invest, study and specific campaign sites
Of which, no. of visitors to investinmanchester.com	85,000	66,000	47,000	76,000	86,000	228,000	
Consumer engagements reach (marketing campaigns)	3m	2.5m	28m	2.65m	2.8m	7.95m	Relies on campaign planned going ahead & ability to negotiate MIK from private partners. Lower than Pre COVID due to uncertainty of MAG funding
£m economic impact of promotional campaigns	£12m	£4m	5m	£6m	£8m	£18m	Calculated annually once all booking data is received
Of which, £m economic impact of international campaigns	£8m	£1m	£0m	£3m	£5m	£9m	Calculated annually once all booking data is received. Lower due to uncertainty of MAG funding
Business engagements	4000	1500	1,316	2000	2500	6,000	e.g. THL presentations, info, meetings, newsletters, product updates, travel trade & operators
Business Assists (incl key commercial Partner accounts managed)	400	400	468	440	480	1320	e.g. marketing support, insights, sponsorship, routes to market for commercial partners & skills/ WFD services

MM Value Added / Strategic Alignment KPIs							
Funding Leverage	1:1	1:1	4:1	1:1	1:1	1:1	Leverage of partner investment and support in GM promotions
Strength of Commercial Partner Relationships	N/A	55%	60%	65%	75%	75%	% of partners with good or above relationship
% of commercial partners signed up to GM Initiatives	N/A	15%	17%	20%	35%	25%	Eg Mayoral Charter Green/ Zero Carbon & Skills/Workforce
No of conference bids in other non-priority sector topics	N/A	3	3	4	5	12	Eg wider GM Vision social and EDI conferences
No of events/seminars delivered focussed on GM's priority sectors/themes	N/A	24	18	26	28	78	E.g. social inclusion, EDI, employment - engaging and educating to influence, raise awareness & change perceptions.
No of businesses registered for events/seminars focussed on GM's priority sectors/themes	N/A	1200	1237	1300	1400	3900	Engaging and educating to influence, raise awareness, change perceptions and strengthen the Manchester Partnership
No of National representations on behalf of GM	N/A	24	24	24	24	72	E.g. Visit Britain/ VisitEngland, DCMS, BVE Partnership, Tourism Alliance, Core Cities, UKH, ACE
Strategy development	N/A	2	2	2	2	6	E.g. GM TH&L Recovery Strategy, Tourism Strategy, BVE Strategy, Destination Management Plan, ABID

Annex 2. Inward Investment & Promotional Stats by Local Authority April – Dec 2021

The following tables give an overview of the individual local authority inward investment performance both in the current financial year (up to Q3) and also the previous financial year – which was heavily impacted by the Covid-19 Pandemic. Work is currently underway to undertake an analysis of postcode data of people who have been employed in the jobs created across GM from inward investment over the last 2 years, to examine the spread of where people in these roles reside and therefore look at the wider geographic impact of these roles and their contribution to the inclusivity agenda. **MIDAS YTD figures are correct as of 18/02/2022.**

MIDAS Inward Investment Results										
FY22 YTD (April 2021 - Present)										
	Bolton	Bury	Machester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan
Project Wins	2	2	25	0	3	10	3	2	5	1
<i>of which new investors</i>	0	0	16	0	1	6	0	0	2	0
<i>of which FDI</i>	2	1	18	0	3	7	2	2	4	1
Job Creations	80	22	3509	0	168	650	170	14	221	25
<i>of which new investors</i>	0	0	1851	0	120	160		0	36	0
<i>of which FDI</i>	80	6	2140	0	168	175	50	14	201	25
Jobs safeguarded	55	0	88	0	75	306	130	3	266	0
<i>of which new investors</i>	0	0	58	0	1	1		0	0	0
<i>of which FDI</i>	55	0	61	0	75	306	130	3	266	0
GVA Created	£4,756,880	£1,061,950	£230,980,317	£0	£9,989,448	£36,689,440	£9,596,000	£832,454	£12,526,037	£1,486,525
<i>of which new investors</i>	£0	£0	£100,520,891	£0	£7,135,320	£10,021,890	£0	£0	£1,525,752	£0
<i>of which FDI</i>	£4,756,880	£356,766	£107,961,188	£0	£9,989,448	£11,150,260	£2,460,680	£832,454	£11,678,397	£1,486,525
FY21 (April 2020 - March 2021)										
	Bolton	Bury	Machester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan
Project Wins	1	1	29	1	3	7	5	4	3	1
<i>of which new investors</i>	0	0	15	0	0	4	2	0	0	0
<i>of which FDI</i>	1	0	20	1	3	6	4	4	3	0
Job Creations	30	15	1017	60	26	314	251	96	117	36
<i>of which new investors</i>	0	0	457	0	0	169	20	0	0	0
<i>of which FDI</i>	30	0	538	60	26	250	231	96	117	0
Jobs safeguarded	0	11	165	25	0	0	211	74	8	0
<i>of which new investors</i>	0	0	17	0	0	0	1	0	0	0
<i>of which FDI</i>	0	0	155	25	0	0	210	74	8	0
GVA Created	£1,783,830	£891,915	£73,491,367	£3,567,660	£1,545,986	£15,842,944	£9,358,491	£5,169,711	£5,473,151	£2,140,596
<i>of which new investors</i>	£0	£0	£27,372,305	£0	£0	£8,652,539	£2,460,600	£0	£0	£0
<i>of which FDI</i>	£1,783,830	£0	£35,157,721	£3,567,660	£1,545,986	£11,872,960	£6,897,891	£5,169,711	£5,473,151	£0
Cumulative Figures (April 2020 - Present)										
	Bolton	Bury	Machester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan
Project Wins	3	3	54	1	6	17	8	6	8	2
<i>of which new investors</i>	0	0	31	0	1	10	2	0	2	0
<i>of which FDI</i>	3	1	38	1	6	13	6	6	7	1
Job Creations	110	37	4526	60	194	964	421	110	338	61
<i>of which new investors</i>										
<i>of which FDI</i>	110	6	2678	60	194	425	281	110	318	25
Jobs safeguarded	55	11	253	25	75	306	341	77	274	0
<i>of which new investors</i>	0	0	75	0	1	1	1	0	0	0
<i>of which FDI</i>	55	0	216	25	75	306	340	77	274	0
GVA Created	£6,540,710	£1,953,865	£304,471,684	£3,567,660	£11,535,434	£52,532,384	£18,954,491	£6,002,165	£17,999,188	£3,627,121
<i>of which new investors</i>	£0	£0	£127,893,196	£0	£7,135,320	£18,674,429	£2,460,600	£0	£1,525,752	£0
<i>of which FDI</i>	£6,540,710	£356,766	£143,118,909	£3,567,660	£11,535,434	£23,023,220	£9,358,571	£6,002,165	£17,151,548	£1,486,525

MM Promotional Stats

The following table shows the local authority activity across Visit Manchester's digital channels. Businesses across all local authorities have the opportunity to be profiled on VisitManchester.com.

Local authorities provide content and request specific businesses to be featured on the site. In addition, businesses can contact Marketing Manchester directly to be profiled.

Currently, 139 businesses across Greater Manchester annually pay into a visitor economy membership scheme, accessing a host of additional benefits. The breakdown within each authority is profiled within the table. A pipeline of potential businesses that could benefit from the membership scheme are qualified and profiled on the CRM system.

VisitManchester.com: Activity & Supporting Statistics 21/22 for GM LAs	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan
Total No. businesses profiled on VM website/content provided by LA	106	148	1,593	319	172	222	89	84	527	82
Total website page views for businesses/events by LA	27,362	114,498	3,563,244	103,575	35,445	451,412	38,667	67,041	651,517	19,529
Total Social media impressions for businesses/events in each LA	39,727	110,364	4,690,183	43,388	23,047	565,259	9,935	12,003	309,599	7,546
Total No. contacts receiving MM stakeholder newsletters in each	18	8	154	13	13	14	13	10	15	9
Current No. of commercial visitor economy partners in each LA	0	3	116	1	0	10	2	0	7	0
Pipeline of qualified business leads to follow up in each LA	4	15	284	16	8	22	15	1	38	7