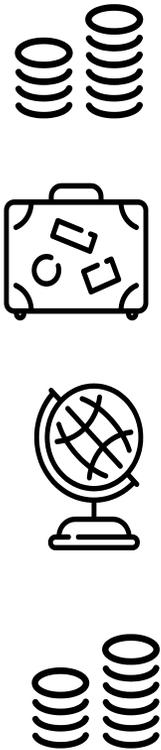


The impact of Covid-19 on GM Culture



The visitor economy prior to lockdown



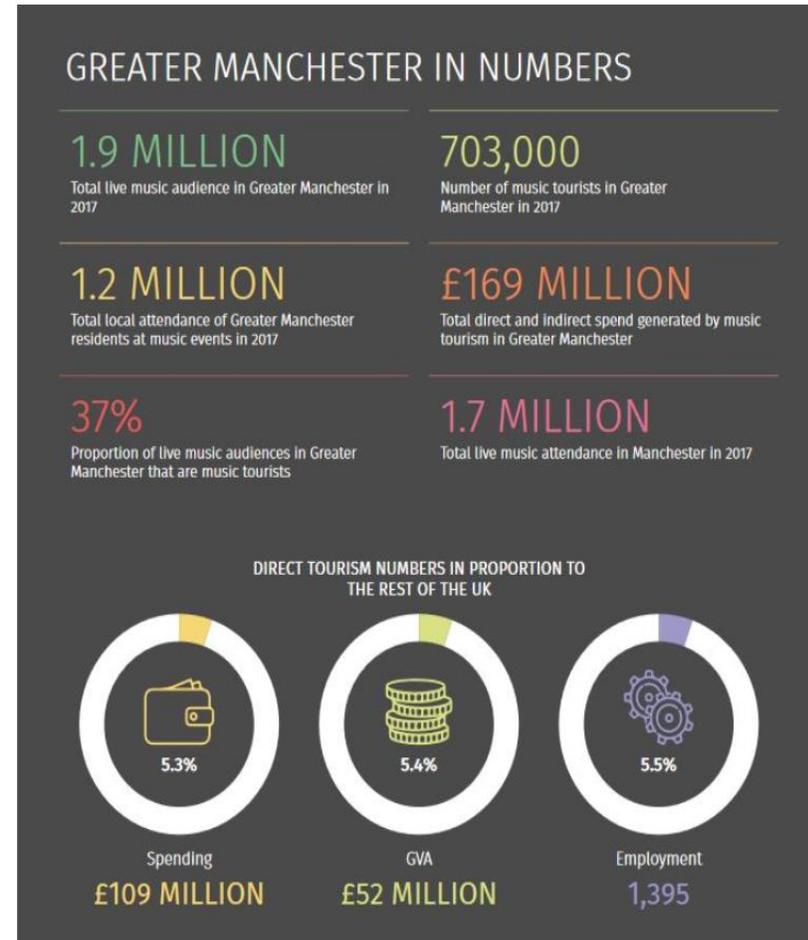
The Visitor Economy in Greater Manchester was worth £9billion, creating £2.6bn GVA and supporting 105,000 jobs. 119m visitors – 11m staying and 108m day visitors

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3rd most visited international destination in UK after London and Edinburgh, with 1.4m international visitors

More than £66.2m combined investment p/a in culture, creativity and heritage from national partners including Arts Council England and Heritage Lottery Fund

MUSIC ALONE



Bringing life to GM and GM to Life

Beyond the economic impact of GM's cultural, creative and heritage sectors, we must recognise the role these industries and sectors play in Greater Manchester's international brand and in improving the health, wellbeing, resilience and happiness of all our residents.

These sectors play a vital role in the vibrancy of our places, from our town and city centres to our high streets, schools, colleges and care settings. They are transformative in terms of income-generation, job creation and export earnings and can contribute to the revitalising and reshaping local and national economies, the overall wellbeing of communities, individual self-esteem, quality of life, dialogue and cohesion.



Survival into Recovery

- While many places and sectors have started to turn attention towards recovery, the cultural and Creative industries are still facing challenges around survival
- Council support as well as local and national financial support and the furlough scheme has protected many businesses operating in these sectors – allowing many to remain dormant and others to modify their business to continue trading or activity in some form e.g. digital cultural engagement
- When financial support ends and the national furlough scheme ends on 31st October, many of these businesses will still be unable to operate in a financially viable way due to restrictions around social distancing and public reticence to gather in large numbers
- We need to work out how GM can best support these businesses and our residents operating within them to adapt and survive until conditions change and we can start to look at recovery and how we might build back better

The impact of lockdown – Culture & Creative

- Since lockdown was announced in March, all theatres, music venues, art galleries, and festivals shut their doors and cancelled all physical activity. While some have managed to maintain some level of digital delivery, or have supported wider GM responses in relation to supporting vulnerable residents, most staff have been placed on furlough and delivery has ceased.
- While some orgs are technically able to open, many are struggling to generate the earned income required to operate as a viable concern and will do so until there is no longer a requirement for social distancing.
- **Nationally, Oxford Economics research, commissioned by the Creative Industries Federation research projects;**
 - Drop of £74 billion for the UK's creative industries in 2020 (£1.4 billion a week)
 - 406,000 (1 in 5) creative jobs expected to be lost - more than nine times the entire workforce of British Airways or almost triple the workforce of Asda in the UK.
 - Creative industries GVA projected to fall by £29 billion (-25%), with the creative industries being hit twice as hard as the wider UK economy*
 - Music, performing and visual arts projected to lose £11 billion in revenue (-54%) and 57% of jobs (178,000) with theatres, recording studios and concert venues remaining closed.

GM is the second largest cluster of creative industries outside London and the South East, so the impact is likely to be felt more keenly than in other places around the country.

Measures Taken - Culture

- In March, GMCA Portfolio leads agreed to forward fund the first six months of Culture Fund grant payments to the 32 GM culture fund recipients with no expectation of delivery. The amount granted by GMCA to organisations for the first six months was £1.75m. This gave organisations, like the Halle, Royal Exchange, Bury Met, Oldham Coliseum, Bolton Octagon, Brighter Sounds, breathing and planning space so they could support their staff and adapt their business and programming as required.
- In March, GMCA Launched GM Covid Commissions – 60 grants of £500 to support individual artists to create a piece of work in response to Covid – providing musicians, poets, illustrators, artists, writers and designers with vital funds while creating an archive of creative responses to the pandemic.
- In April GM NTE Adviser Sacha Lord launched United We Stream, in swift response to the UK shut down due to coronavirus. The platform was designed to raise funds for the culture and night time economy sector to support the through this challenging time. In just eight weeks the platform has hosted more than 300 globally renowned artists and local breakthrough talent, has reached more than 14 million people across the world, promoting GM as a culturally vibrant and forward thinking place. United We Stream has raised £477,000 in donations, which are now being distributed to businesses and individuals in the creative and night time economy through the United We Stream Solidarity Fund.
- Throughout May, GMCA developed and delivered the Creative Care Packs project, distributing 22,000 Creative Care kits to young people who are not online, and so may be feeling more isolated and lonely during this difficult time.
- Liaison with districts and national bodies including Arts Council England, DCMS, Creative Industries Federation, Historic England and National Lottery Heritage Fund to develop understanding the scale of the crisis and develop a long-term response.

Living with COVID-19

- Operators able to open on July 4th still face major challenges in making their businesses safe and sustainable, especially into Autumn as weather reduces potential to operate outside
- Concern over potential for premises to be location of infection or localised lock-downs and the impact that will have on staff, performers, businesses and customers. Clear communication and consumer confidence in the safety measures applied by these businesses key
- National and local attitude surveys indicate preference for staying/shopping/undertaking leisure activity locally, especially with current restrictions on public transport. While this provides opportunity for businesses in our suburbs, villages and local highstreets, additional support might be required to entice consumers back to our larger town and city centres.
- Businesses unable to reopen safely due to social distancing may need to lay dormant into 2021.
- Likely that there will be mass redundancies in the sector once government schemes cease. Need for support for those affected to be supported into new jobs in less affected sectors while ensuring there is still space for young people in the sectors most affected as part of build back better.
- Need to maintain international profile of Greater Manchester's vibrant, welcoming night life, hospitality and cultural sector, in line with GM's refreshed Internationalisation strategy