ONE STOP INTELLIGENCE DOCUMENT – GREATER MANCHESTER'S TOURISM SECTOR

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TOURISM – ITS VALUE TO THE LOCAL ECONOMY

THE VISITOR ECONOMY - VALUE

Marketing Manchester works with Global Tourism Solutions (UK) Ltd to provide an indication of the economic impact of the visitor economy, in terms of both the direct impact (within the hosting businesses) and indirect impact (within the supply chain) and also with regards to the number of jobs supported by this activity.

The latest available data shows an economic impact of £9.0bn and 100,700 FTEs supported from Greater Manchester's tourism activity; to include an economic impact of £4.86bn and 53,400 FTEs supported within Manchester local authority. Further information is below.

	Economic impact of tourism activity in Greater Manchester	Economic impact of tourism activity in Manchester City Local Authority
2018	£9.0 billion	£4.86 billion
2017	£8.4 billion	£4.51 billion
2016	£8.1 billion	£4.37 billion
2015	£7.9 billion	£4.24 billion
2014	£7.5 billion	£4.02 billion
2013	£7.0 billion	£3.71 billion
2012	£6.6 billion	£3.41 billion
2011	£6.2 billion	£3.23 billion
2010	£5.8 billion	£2.93 billion
2009	£5.4 billion	£2.67 billion
2008	£5.2 billion	£2.62 billion
2007	£5.4 billion	£2.74 billion
2006	£4.9 billion	£2.46 billion
2005	£4.6 billion	£2.23 billion

	FTEs supported by tourism activity in Greater Manchester	FTEs supported by tourism activity in Manchester City Local Authority
2018	100,700	53,400
2017	95,800	50,400
2016	94,000	49,600
2015	93,900	49,400
2014	92,000	48,100
2013	88,900	46,000
2012	83,900	42,500
2011	81,000	40,900
2010	77,000	37,300
2009	75,300	35,700
2008	73,200	34,500
2007	73,500	34,600
2006	70,800	32,600
2005	68,200	30,500

Source: STEAM; Scarborough Tourism Economic Activity Monitor, Global Tourism Solutions (UK) Ltd.

If it would be useful to receive a copy of the STEAM 2018 reporting document, please contact: research@visitmanchester.com

CONFERENCE & BUSINESS EVENTS - VALUE

Conference and business events support the wider tourism industry, both in terms of business revenue streams and through supporting jobs across a number of sectors. In 2018, Marketing Manchester commissioned an update to the biennial Conference Value & Volume study, to report on 2017 activity. It identified that:

- the value of the sector to Greater Manchester was £904m (£862m from core activity and £42m from leisure extensions).
- the sector was estimated to support 22,000 direct jobs within Greater Manchester, through its core activity, and 35,100 jobs when including the indirect jobs in the supply chain, some of which will be based in Greater Manchester, some outside. Leisure extensions support a further 1,600 jobs (1,000 being direct jobs).
- the average value of a 'day' delegate (per trip) was £93, considering that a day delegate can be attending multiple days, whilst the average value of a staying delegate was £321 (per trip).
- 55% of Greater Manchester's economic impact is generated by venues within the city centre, 28% by association business, 53% from bookings from outside the Northwest, and 74% by staying delegates.

Source: Conference Value & Volume 2018 (reporting on 2017), undertaken by RJS Associates.

If it would be useful to receive a copy of the Conference Value & Volume reporting document, please contact: research@visitmanchester.com

LEISURE VISITS – VALUE PER HEAD

A range of visitor motivations, matched with Greater Manchester's product offer, supports the number of leisure visits made to Greater Manchester each year.

Marketing Manchester commissioned its latest detailed research into the leisure visitor market in 2018, with support from partners; Transport for Greater Manchester and Manchester Business Improvement District, through the Greater Manchester Leisure Visitors Survey. The survey provided a range of intelligence on the market to include the following update to visitor spend:

- A day visitor spent an average of £46.
- A staying visitor in paid-for accommodation spent an average of £130, per person per day, including accommodation, and £84 excluding accommodation.
- A visitor staying overnight with friends and family will spend £50 per day.
- The £46 day visitor spend, £50 staying with friends and relatives visitor spend and £84 staying in paid-for accommodation visitor spend refers to spending in shops, restaurants, entertainment venues, at attractions and on local transport within the destination.

Source: Greater Manchester Leisure Visitors Survey 2018, undertaken by Bluegrass Research Limited. 785 sample from face-to-face interviews at 22 sites in Manchester, Salford and Trafford.

If it would be useful to receive a copy of the report, to include additional intelligence on leisure visits, please contact: research@visitmanchester.com

VALUE PER HEAD – BY TYPE OF VISITOR

Below is a summary of the visitor value for a range of visitor types. The figures are taken from a range of sources, and sample sizes, and are intended to provide an indication on value for each type of visitor attracted to Greater Manchester. The information is provided where it is available from the referenced source.

Visitor type to Greater Manchester	Spend per day	Average length of stay in Greater Manchester	Spend per trip	Source*
Leisure day visitor	£46	1 day	£46	1
Day delegate**	£62	-	£93	2
Leisure visitor staying with friends and family	£50	4.25 nights	£213	1
International leisure (non-VFR) visitor from the European Union	£91	3.30 nights	£301	3
International association delegate	-	-	£333	2
Leisure visitor staying in paid-for accommodation	£130	2.70 nights	£351	1
International leisure (non-VFR) from USA	£123	3.26 nights	£401	3
Average international leisure (non-VFR) visitor	£115	3.75 nights	£433	3
International leisure (non-VFR) from China	£197	4.03 nights	£795	3
International (non-VFR) from Gulf Co-operation Countries	£170	5.86 nights	£999	3

*Sources: 1. Greater Manchester Leisure Visits Survey 2018; Marketing Manchester.
2. Conference Value & Volume 2018; reporting on the 2017 market; Marketing Manchester.
3. International Passenger Survey 2018; Office of National Statistics & supported by VisitBritain; using 'holiday' and 'misc.' categories.
Note: VFR: visiting friends and relatives.

**Day delegate: Could be attending a conference for more than one day but not staying over.

VISITORS TO MANCHESTER – BENCHMARKING & VISITOR PROFILE

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INTERNATIONAL VISITS - BENCHMARKING

Of the 1.6m international visits to Greater Manchester in 2018, 1.4m were to Manchester, maintaining its position as the third most visited UK destination, behind London (1) and Edinburgh (2), as detailed below in the first column. Also shown is how Manchester compares on holiday and business visits.

	All international visits	International holiday visits only	International business visits only
1	London (19.1m)	London (9.5m)	London (3.5m)
2	Edinburgh (2.4m)	Edinburgh (1.6m)	Birmingham (565,060)
3	Manchester (1.4m)	Glasgow (473,290)	Manchester (386,490)
4	Birmingham (1.1m)	Manchester (443,930)	Edinburgh (200,340)
5	Glasgow (837,020)	Liverpool (338,580)	Liverpool (184,590)

Note: The full list of visit categories is; business, holiday, visiting friends and relatives, study and other.

Source: International Passenger Survey 2018, Office for National Statistics and supported by VisitBritain.

If you would find it useful to see a detailed overview of Greater Manchester's dataset please request a copy of the International Markets Annual Snapshot from: research@visitmanchester.com

INTERNATIONAL VISITS - PROFILE

The Office of National Statistics, and supported by VisitBritain, undertake the International Passenger Survey that measures trends in inbound tourism to the UK. Of the 1.6m international visits made to Greater Manchester in 2018; 32% were visiting friends and relatives, 29% were holiday visits, 26% business visits, 1% study visits and 11% of visits reported a purpose of visit that came under the miscellaneous category.

Marketing Manchester understands that the vast majority of trip purposes listed under 'miscellaneous' within the 2018 Greater Manchester dataset were associated with the leisure visitor market. The top ten visitor markets for the accumulative 'holiday' and 'miscellaneous' visits were:

1. Irish Republic
2. USA
3. Norway
4. Germany
5. China
6. Italy
7. Spain
8. France
9. GCC
10. The Netherlands

If you would find it useful to see a detailed overview of Greater Manchester's dataset please request a copy of the International Markets Annual Snapshot from: research@visitmanchester.com

DOMESTIC VISITS - BENCHMARKING

STAYING VISITS

VisitEngland undertake the Great Britain Tourism Survey that enables destinations, and reporting areas, to measure their staying visits in a consistent methodology through a demand-led survey.

The study estimates that Greater Manchester receives 3.4m staying visits from within Great Britain.

Manchester local authority is the most visited in Great Britain by domestic residents on a staying visit; to include holiday, business and visiting friends and relatives, at 2.6m visits, with Edinburgh and Birmingham to follow.

Source: Great Britain Tourism Survey, VisitEngland, using a 2016-18 average.

DAY VISITS

VisitEngland undertake the Great Britain Day Visits Survey that enables destinations to measure their day visits in a consistent methodology with other destinations, through a demand-led survey.

The study estimates that Greater Manchester attracts 65.1m tourism day visits per year from Great British residents (from a total of 125m day visits made), and this includes 30.2m tourism day visits to Manchester (46%). Manchester is the second most visited local authority for tourism day visits in England, behind the City of London and followed by Birmingham and City of Westminster local authorities.

Source: Great Britain Day Visits Survey, VisitEngland, using a 2016-18

ICCA RANKINGS – CONFERENCE & BUSINESS EVENTS

In 2018 Manchester hosted 29 ICCA-ranked events resulting in a global ranking of 93rd and a UK ranking of 5th (behind London, Edinburgh, Glasgow and Oxford).

Note: An ICCA-ranked event is one that is held in at least three rotating countries and the position allocated to cities is based on the number of ICCA-ranked events held.

Source: ICCA Country & City Rankings 2018, International Congress & Convention Association.

VISITOR PROFILE – LEISURE VISITS

Marketing Manchester commissioned the Greater Manchester Leisure Visitor Survey 2018, working with partners; Transport for Greater Manchester and Manchester Business Improvement District, to provide an updated intelligence base on Greater Manchester's leisure visitor market. The findings showed the following visitor profile:

- The geographic markets from within the UK generating the highest levels of visitors were the North West (21%), followed by; Greater London, South East England and Yorkshire & The Humber (each generating 12%); the West Midlands (8%); the East Midlands and Scotland (each generating 7%); the North East (6%) and the South West (5%). Wales, Eastern England and Northern Ireland generated less than 5% each.
- The North West generated 47% of day visits, followed by Yorkshire & The Humber (17%), the East Midlands (9%), the West Midlands (7%) and Greater London (6%). Other counties represented less than 5% of day visits.
- The South East (at 17%) and Greater London (at 16%) generated the highest proportion of staying visitors to Greater Manchester, followed by Scotland (11%), Yorkshire & The Humber, West Midlands and the South West (each generating 8%). The North East generated 7% whilst the North West and the East Midlands generated 6% each. Other counties represented 5% or less.
- 48% of visitors to Greater Manchester were under 35 years of age and 10% were 65+.
- The average group size was 2.8 with 16% of travelling parties including children aged 15 or under. 28% travelled in a family group, 25% travelled alone, 23% with their partner, 21% with friends, and 3% in an 'other' group type.
- 43% of visitors to Greater Manchester were first-time visitors, 67% of international visitors, 49% of staying visitors and 28% of day visitors.
- 74% of leisure staying visits to Greater Manchester required paid-for accommodation and 25% stayed with friends and relatives (and 1% other).
- The average length of stay for visitors staying in paid-for accommodation was 2.7 and 4.3 nights for those staying with friends and family. The average length of stay for an international visitor was 4.3 nights, compared to 2.3 for a visitor within the UK.

Source: Greater Manchester Leisure Visitors Survey 2018, undertaken by Bluegrass Research Limited. 785 sample across 22 sites in Manchester, Salford & Trafford.

If it would be useful to receive a copy of findings, to include additional intelligence on the leisure visitor market please contact: research@visitmanchester.com

CONFERENCES & BUSINESS EVENTS – VISITOR PROFILE

The biennial Conference Value & Volume reporting on the conferences and business events hosted within Greater Manchester shows:

- 55% of delegates are from corporate business, 21% from public/government, 17% from national association and 6% from international association business.
- 45% of delegates come through business booked within Greater Manchester, 70% from within the Northwest, 94% from within the UK, and 6% from overseas.
- 55% of delegates are 'day' delegates and 45% staying delegates.

Source: Conference Value & Volume 2018 (reporting on 2017), undertaken by RJS Associates. If it would be useful to receive a copy of the full findings, please contact: research@visitmanchester.com

THE LEISURE VISITOR – THE VISITOR EXPERIENCE

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ACTIVITIES UNDERTAKEN

Marketing Manchester commissioned the Greater Manchester Leisure Visitor Survey 2018, working with partners Transport for Greater Manchester and Manchester Business Improvement District, to provide an updated intelligence base on Greater Manchester's leisure visitor market. The findings showed the following:

- The most mentioned activities undertaken were; eating out (73%), shopping (59%), visiting a museum and gallery (58%), visiting bars and clubs (29%), visiting a historical site or building (25%), visiting an 'other' attraction i.e. not a museum or gallery, and spectating or participating in a sports event (13% each). These were followed by: go on an organised tour or walk (9%); attend a live music event (8%); go to a festival or event (7%); go to a theatre show (4%), go on the hop-on-hop-off sightseeing bus (3%).
- First-time visitors were more likely to do a wider range of activities. 67% of first-time visitors visited a museum or gallery (compared to 58% of all visitors); 34% visited a historical site or building (compared to 25% of all visitors); 63% went shopping (compared to 59%); 17% visit an 'other' attraction (compared to 13%), 13% went on an organised walk or tour (compared to 9%); 32% visited bars and clubs (compared to 29%); 5% went on the hop-on hop-off sightseeing bus (compared to 3%); 75% ate out (compared to 73%) and 9% attended a festival or event (compared to 7%).
- The attractions receiving a much higher proportion of staying visitors (when compared to day visitors) were; Manchester United FC Museum & Tour, the Science & Industry Museum, People's History Museum and the National Football Museum.
- Almost half of all visitors (48%) visited more than one local authority of Greater Manchester during their trip. This increases to 57% for staying visitors and decreases to 25% for day visitors.
- 17% of visitors visited somewhere outside of Greater Manchester as part of their trip. This increases to 21% amongst staying visitors and decreases to 7% for day visitors. It also increases to 35% for international visitors and decreases to 8% for UK visitors. The most frequently cited destinations were: Liverpool (34%); London (24%); The Lake District & Cumbria and Yorkshire & The Humber (16% each) and Scotland (14%). Other areas were visited by 8% or less.

Source: Greater Manchester Leisure Visitors Survey 2018, undertaken by Bluegrass Research Limited. 785 sample across 22 sites in Manchester, Salford & Trafford.

If it would be useful to receive a copy of findings, to include additional intelligence on the leisure visitor market please contact: research@visitmanchester.com

GREATER MANCHESTER – AS RATED BY LEISURE VISITORS

One of the targets within the Greater Manchester Strategy for the Visitor Economy 2014-2020 is around visitor satisfaction and this is measured through The Greater Manchester Leisure Visits Survey.

The latest visitor survey that gained feedback during 2018; showed an average visitor experience rating of 4.5/5, an improvement on the baseline of 4.2/5, but just under the target for 2020 of 4.7/5.

Visitors were asked to rate Greater Manchester as a leisure destination across twelve categories. All categories received a rating of 4 out of 5 or above.

The highest ratings were given for: pubs/bars/nightlife; the shopping offer; the eating offer, the cultural offer and the range and quality of visitor attractions. These were followed by public spaces, the overall welcome and service received, the services and routes available on public transport, the feeling of safety and the value for money on public transport.

The lowest ratings were received for the signage for getting around on foot and the overall cleanliness. Although these, positively, still rounded to an average of 4 out of 5, 13% of visitors rated the overall cleanliness as poor or very poor and 9% of visitors rated the signage for getting around on foot poor or very poor.

55% of visitors rated the pubs/bars/nightlife as excellent, 46% for the eating offer, the shopping offer, and cultural offer (each), and 44% of visitors rated the range and quality of visitor attractions as excellent.

The longer a visitor stayed, the more likely they would give a lower rating for the overall cleanliness. 71% of day visitors rated this as excellent or good, dropping to 61% of staying visitors. The other factor with a significant difference was for the services and routes available on public transport where 83% of staying visitors reported them as excellent or good, decreasing to 75% for day visitors, those with a shorter time to spend on reaching, and spending time in, the destination.

The 2018 survey recorded an increase, on 2014, in the proportion of visitors reporting excellent or good for the eating offer and the pubs/bars/nightlife offer.

Decreased satisfaction in 2018, on 2014, was particularly evident for the feeling of safety, the overall welcome and service received and the services and routes available on public transport. There was also reduced satisfaction, but to a lesser degree, for the cultural offer, potentially outlining an increasingly competitive destination offer, nationally and internationally.

When considering their expectations prior to their visit, 29% cited that Greater Manchester had exceeded their expectations as a leisure visitor destination, 70% cited it had met their expectations and 2% fed back that it had fallen short. The 29% who reported their expectations had been exceeded was far higher than the 13% in 2014.

Source: Greater Manchester Leisure Visitors Survey 2018, undertaken by Bluegrass Research Limited. 785 sample across 22 sites in Manchester, Salford and Trafford.

If it would be useful to receive a copy of the full findings, to include additional intelligence on demand trends, please contact: research@visitmanchester.com

SOURCES OF INFORMATION USED

The Greater Manchester Leisure Visitors Survey 2018 looked into the sources of information used by visitors to plan and influence their visit. The sources that visitors were more likely to use prior to their trip were:

1. General on-line searches i.e. google, bing etc (by 38%).
2. TripAdvisor (23%).
3. An accommodation booking website i.e. booking.com, laterooms.com, trivago.com etc (15%).
4. Recommendations from friends and family (14%).
5. Visit Manchester on-line channels – website, social media, e-newsletters (11%).
6. Facebook sites - other to Visit Manchester (8%).
7. National travel websites (7%).
8. Instagram sites – other to Visit Manchester (5%).

The sources of information visitors were more likely to use during their trip were:

1. General on-line searches i.e. google, bing etc (by 19%).
2. Manchester Visitor Information Centre (14%).
3. Visit Manchester printed guides or maps (9%).
4. Recommendations from friends and family (7%).
5. TripAdvisor (5%).

First-time visitors showed significantly higher levels of usage than returning visitors for: general on-line searches; TripAdvisor; Visit Manchester printed guides and maps; Manchester Visitor Information Centre; Facebook sites (other to Visit Manchester), and accommodation booking sites.

International visitors showed significantly higher levels of usage than visitors from the UK for: general on-line searches; TripAdvisor; Manchester Visitor Information Centre; Visit Manchester printed guides and maps, and Facebook sites (other to Visit Manchester).

Source: Greater Manchester Leisure Visitors Survey 2018, undertaken by Bluegrass Research Limited. 785 sample across 22 sites in Manchester, Salford and Trafford.

If it would be useful to receive a copy of the full findings, to include additional intelligence on demand trends, please contact: research@visitmanchester.com

VISITOR MOTIVATIONS - VISITS IN PAID-FOR ACCOMMODATION

The leisure short breaks market, conferences and other business visits, provide a baseline occupancy level that is then further boosted by guests staying for other purposes to include those staying to attend events. The events that lead to the highest occupancy peaks include: European, premiership and cup games held at Old Trafford Football Ground and the Etihad Stadium; concerts at Manchester Arena and outdoor stadia, sporting events at Emirates Old Trafford, Manchester Arena and Sportcity, and cultural events and festivals.

For further information on forthcoming events likely to produce high demand for rooms, or for information on peaks in occupancy levels and the events taking place, please contact: research@visitmanchester.com

MOST VISITED ATTRACTIONS

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MOST VISITED ATTRACTIONS 2018				
	Attraction	District	Annual Total	Admittance
1	The Lowry	Salford	829,161	Free*
2	Science & Industry Museum	Manchester	704,732	Free*
3	Manchester Art Gallery	Manchester	655,490	Free
4	HOME (Greater Manchester Arts Centre Ltd)	Manchester	650,731	Free*
5	National Football Museum	Manchester	523,366	Free
6	Manchester Museum	Manchester	476,759	Free
7	The Whitworth	Manchester	359,380	Free
8	Imperial War Museums	Trafford	334,500	Free
9	Dunham Massey	Trafford	317,225	Paid entry
10	Manchester United Museum & Tour Centre	Trafford	310,408	Paid entry
11	The John Rylands Library	Manchester	308,820	Free
12	Runway Visitor Park Manchester Airport	Manchester	307,450	Free*
13	Bolton Museum	Bolton	243,818	Free
14	East Lancashire Railway	Bury	205,818	Paid entry
15	Manchester Cathedral	Manchester	173,011	Free
16	People's History Museum	Manchester	127,800	Free
17	Salford Museum and Art Gallery	Salford	108,417	Free
18	Portland Basin Museum	Tameside	108,299	Free
19	Gallery Oldham	Oldham	91,865	Free
20	Breakout Manchester	Manchester	69,223	Paid entry
21	Ordsall Hall	Salford	30,760	Free
22	Stockport Air Raid Shelters	Stockport	28,461	Paid entry
23	BBC & CBBC Tours MediaCityUK	Salford	27,753	Paid entry
24	Smithills Hall	Bolton	26,696	Free
25	GMP Museum & Archives	Manchester	21,154	Free
26	Hat Works	Stockport	19,446	Free
27	Museum of Transport	Manchester	18,949	Paid entry
28	Bramall Hall	Stockport	18,450	Paid entry
29	Stockport War Memorial Art Gallery	Stockport	18,417	Free
30	Stockport Museum	Stockport	14,354	Free

Key

Free — Free to enter (also including those that are free to enter and invite donations.

Free* — An entrance fee may be charged to specific exhibitions, performances, and activities held within the venue whilst other spaces are free admittance.

Paid entry — Key elements of the attraction or experience have an entrance fee but some areas could be free to enter.

MOST VISITED FREE ADMITTANCE ATTRACTIONS 2018				
	Attraction	District	Annual Total	Admittance
1	The Lowry	Salford	829,161	Free*
2	Science & Industry Museum	Manchester	704,732	Free*
3	Manchester Art Gallery	Manchester	655,490	Free
4	HOME (Greater Manchester Arts Centre Ltd)	Manchester	650,731	Free*
5	National Football Museum	Manchester	523,366	Free
6	Manchester Museum	Manchester	476,759	Free
7	The Whitworth	Manchester	359,380	Free
8	Imperial War Museums	Trafford	334,500	Free
9	The John Rylands Library	Manchester	308,820	Free
10	Runway Visitor Park Manchester Airport	Manchester	307,450	Free*
11	Bolton Museum	Bolton	243,818	Free
12	Manchester Cathedral	Manchester	173,011	Free
13	People's History Museum	Manchester	127,800	Free
14	Salford Museum and Art Gallery	Salford	108,417	Free
15	Portland Basin	Tameside	108,299	Free
16	Gallery Oldham	Oldham	91,865	Free
17	Ordsall Hall	Salford	30,760	Free
18	Smithills Hall	Bolton	26,696	Free
19	GMP Museum & Archives	Manchester	21,154	Free
20	Hat Works	Stockport	19,446	Free

MOST VISITED PAID ENTRY ATTRACTIONS 2018				
	Attraction	District	Annual Total	Admittance
1	Dunham Massey	Trafford	317,225	Paid entry
2	Manchester United Museum & Tour Centre	Trafford	310,408	Paid entry
3	East Lancashire Railway	Bury	205,818	Paid entry
4	Breakout Manchester	Manchester	69,223	Paid entry
5	Stockport Air Raid Shelters	Stockport	28,461	Paid entry
6	BBC & CBBC Tours MediaCityUK	Salford	27,753	Paid entry
7	Museum of Transport	Manchester	18,949	Paid entry
8	Bramall Hall	Stockport	18,450	Paid entry
9	Staircase House	Stockport	10,950	Paid entry
10	Elizabeth Gaskell's House	Manchester	6,667	Paid-entry

Accompanying note

These listings are generated from the attractions submitting data to Marketing Manchester and who have also provided consent to Marketing Manchester for their attraction to be referenced in this listing. Figures collected by Marketing Manchester reflect the requirements for STEAM, measuring activity per calendar year. Libraries that are of significant cultural or historical significance can be included if visitor numbers can be separated between those using the library for general leisure or research purposes to those looking to experience the cultural or historical aspect, or if VAQAS accredited.

ACCOMMODATION PROVISION

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CURRENT PROVISION

GREATER MANCHESTER

The following provides a breakdown of the current visitor accommodation stock levels in Greater Manchester:

Property Type	No. of properties	No. of rooms
Hotel: 5 star or equiv.	5	665
Hotel: 4 star or equiv.	50	8,187
Hotel: 3 star or equiv.	104	10,703
Hotel: 1 or 2 star or equiv.	36	2,884
Hotel: Unaccredited/tbc/unknown	6	105
Guest Accommodation (B&B, guest house, inn)	123	1,163
Self-catering units (Apartment, cottage, house)	290	457
Serviced apartments	30	1,575
Total	644	25,739

MANCHESTER CITY CENTRE

The following provides a breakdown of the current visitor accommodation stock levels in Manchester city centre:

Property Type	No. of properties	No. of rooms
Hotel: 5 star or equiv.	4	500
Hotel: 4 star or equiv.	26	4,953
Hotel: 3 star or equiv.	15	2,897
Hotel: 1/2 star or equiv.	11	1,065
Hotel: Unaccredited/tbc/unknown	2	24
Guest Accommodation (B&B, guest house, inn)	10	90
Self-catering units (Apartment, cottage or house)	57	111
Serviced apartments	19	1,184
Total	144	10,824

Source: Accommodation Counts Master xls 27/02/2020.

Notes
1. There is additional accommodation provision within hostels, camping and caravanning sites and university summer lets.
2. There is additional provision just outside the Manchester border, in a number of hotels, to include 5-star accommodation at The Lowry, Salford.
3. The above stock counts were updated 21 February 2020 with the latest information coming from the annual STEAM process.
4. A further change was made 26 February 2020 to remove approx. 100 budget rooms from Manchester city centre to 'outside' from south of the Oxford Road Corridor.

RECENT OPENINGS

Greater Manchester's visitor accommodation supply experienced a significant boost in 2015 when Hotel Football, Hotel Gotham, INNSIDE Manchester, Motel One Piccadilly, King Street Townhouse and Eleska's Apartment by Stylish Stay, all opened.

This was followed in 2016 with Holiday Inn Manchester City Centre, Premier Inn MediaCityUK, Travelodge Sale, Travelodge Stockport and Holiday Inn Express Stockport.

In 2017, new providers include; CitySuites in Salford (237 apartments), Oddfellows On The Park in Stockport (22 rooms), easyHotel Manchester (115 rooms), Parkhill Luxury Serviced Apartments in Salford 30 rooms (30 rooms), Staycity Manchester Piccadilly (182 apartments), Holiday Inn Express TRAFFORDCITY (220 rooms) , Motel One Manchester Royal Exchange (301 rooms) , Hilton Garden Inn Emirates Old Trafford (150 rooms), Milton Manchester Hotel in Salford (160 rooms), Phase 1 of Haigh Hall in Wigan (11 rooms) and Holiday Inn Express Wigan (86 rooms).

2018 saw the opening of The Cow Hollow Hotel (16 rooms) in January, Roomzzz Manchester Corn Exchange in February (114 rooms), IHG's Crowne Plaza Manchester – Oxford Road (212 rooms) and Staybridge Suites – Oxford Road (116 rooms) in September, Marriott's AC Hotel Manchester City Centre (172 rooms) in October, Whitworth Locke (160 rooms) in November and Hotel Indigo Manchester – Victoria Station (187) in December.

2019 saw the opening of the Dakota Manchester (137 rooms), Native Manchester (162 apartments) and the Stock Exchange Hotel (40 rooms).

2020 has so far seen the opening of The Niu Loom at The Irish World Heritage Centre (135 rooms) and Hotel Brooklyn Manchester (189 rooms) with further to follow later in the year.

HOTELS IN THE PIPELINE

Over 6,529 new rooms are confirmed for Greater Manchester, from new openings and property extensions, a growth of 26% on the current supply. In terms of Manchester city centre, a planned 3,680 rooms are due to come on board that would increase the current supply by 34%.

These sites are also shown in map format at:
https://drive.google.com/open?id=1LqeJD_CknjE4kELUbRPDdzwRTOUexf8K&usp=sharing

In addition to the hotels that have already opened this year (2020), additional pipeline is expected to come to market before the end of the year including Staycity Aparthotel Manchester Northern Quarter, Hampton by Hilton Manchester Northern Quarter, Cotton Yard and the Circle Square site (hotels 13, 3, 2 and 17 on the adjacent table).

HOTELS IN THE PIPELINE (cont)

The following lists the confirmed builds in the pipeline.

	Hotel & Location	Rooms
	Manchester City Centre	
1	Clayton Hotel Manchester City Centre	329 rooms
2	Cotton Yard (Chorlton St.)	41 apts
3	Hampton by Hilton Manchester Northern Quarter	221 rooms
4	Hotel Du Vin (Princess St.)	70 rooms
5	Leonardo Manchester Piccadilly (Adair St.)	275 rooms
6	London Road Firehouse	41 rooms
7	Maldron Hotel Manchester	278 rooms
8	Meininger Hotel Manchester	212 rooms
9	Mollie's Motel & Diner (St. John's)	210 rooms
10	Motel One Three St. Peter's Square	328 rooms
11	MOXY by Marriott – Manchester (Spinningfields)	145 rooms
12	QBIC Manchester (John Dalton House)	261 rooms
13	Staycity Aparthotel Manchester Northern Quarter	224 rooms
14	The Quality Street Hotel (former Commercial Hotel)	42 rooms
15	Toyoko Hotel	350 rooms
16	Wilde by StayCity Manchester – Three St. Peter's Sq.	256 rooms/apts
17	(TBC) Circle Square, Oxford Road.	155 rooms
18	(TBC) St. Michael's (tower).	191 rooms
19	(TBC) St. Michael's (former police station).	25 rooms
20	(TBC) 52-58 Thomas Street, Northern Quarter.	26 apts
	Manchester Airport	
21	Hampton by Hilton Manchester Airport - AirportCity	375 rooms
22	Hilton Garden Inn - AirportCity	254 rooms
23	Holiday Inn Manchester Airport - AirportCity	280 rooms
24	Ibis Budget Manchester Airport - AirportCity	262 rooms
	Other locations in Greater Manchester	
25	Bolton: (TBC) Church Wharf	80 rooms
26	Bolton: (TBC) Hulton Hall.	142 rooms
27	Manchester: Cornbrook Hub / Manchester Waters	242 rooms (155 + 88)
28	Manchester: Holiday Inn Express Central Park Plaza	120 rooms
29	Oldham: (TBC) Rock Street	70 rooms
30	Oldham: Travelodge Prince's Gate	68 rooms
31	Rochdale: (TBC) Riverside	TBC
32	Salford: CitySuites (2nd property)	147 rooms
33	Hilton Garden Inn Emirates Old Trafford – 2nd block	109 rooms
34	Trafford: Trafford Waters	300 rooms
35	Trafford: Victoria Warehouse (extension only)	400 (add.) rooms

There are also additional sites that could potentially operate a hotel but these either haven't got full planning permission or have been put on hold.

21/02/2020.

FURTHER INFORMATION

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GLOSSARY OF LOCATION DEFINITIONS USED IN THIS DOCUMENT

- Manchester city centre – The area indicated on the map at https://www.visitmanchester.com/dbimgs/New%20Map%20Layout%20Oct%2016_LOW.pdf can be used as an indication but please note that the figures referred to as 'Manchester City Centre' exclude the Salford area (around New Bailey) left of the River Irwell. The figures also include Oxford Road as far as Manchester Museum and incorporating the visitor accommodation hub around Alliance Manchester Business School.
- Manchester district – the local authority of Manchester City Council.
- Greater Manchester – the ten local authorities of; Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford and Wigan.

INTELLIGENCE UPDATES FOR 2020

- Hotel Performance Monitors (monthly)
- Events database covering large capacity for hotel planning and occupancy monitoring (monthly)
- Hotel Market Outlook (end of February and summer)
- Most Visited Attractions (April)
- International Passenger Survey 2019 – top-line Greater Manchester data abstracted only (late May/early June)
- International Markets Annual Snapshot (August)
- STEAM 2019 (TBC)

OTHER USEFUL INFORMATION

TOURISM PRIORITIES IN GREATER MANCHESTER

The Greater Manchester Strategy for the Visitor Economy 2014-2020 provides the context of the tourism environment in Greater Manchester and priorities for growth and development. The final page also states the eight targets for 2020 set for Greater Manchester's tourism industry:
http://www.marketingmanchester.com/wp-content/uploads/2017/02/tourism-strategy-2013.pdf

The Greater Manchester Destination Management Plan is the Visitor Economy Action Plan, covering 2017-2020, and can be downloaded at:
http://www.marketingmanchester.com/wp-content/uploads/2017/02/DMP-2017_2020-FINAL.pdf

The consumer website with a target audience of leisure visits can be found at: https://www.visitmanchester.com/ and this runs alongside the website for conference and business events at: https://www.meetinmanchester.com/

GREATER MANCHESTER TOURISM INTELLIGENCE - CONTACT DETAILS

If you require further information...

http://www.marketingmanchester.com/resources/research-data-publications/ provides an overview of the documents that are available, or please contact research@visitmanchester.com

Marketing Manchester is responsible for marketing Greater Manchester on a national and international stage as a place to visit, invest, meet and study and is also the Destination Management Organisation for Greater Manchester.

Latest available figures February 2020