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TOURISM – ITS VALUE TO THE LOCAL ECONOMY

ECONOMIC IMPACT

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 (through the supply chain).

Marketing Manchester commissions this study on behalf of Greater Manchester and local authority level data is available from the authorities who commission this for their area.

HOW WE MEASURE IT

Our economic impact figures are calculated from a number of measures and where possible this is gathered at a local level.

Local level inputs include the following:

- Accommodation records (rooms, beds and tariffs);
- Occupancy rates
- Visits to attractions and annual events attracting visitors
- Visits to visitor information centres
- Visitor spend by a leisure visitor across a number of visit type categories and to a number of business types

This is supplemented by work undertaken within national research where data gaps exist.

ANNUAL VALUE

Greater Manchester's visitor economy generates £8.1bn including the £4.4bn that is generated within Manchester local authority.

Below is the economic impact since 2005, for both geographies, and please note that all figures are unindexed and therefore represent the value at that year in time.

	Economic Impact to Greater Manchester	Economic Impact to Manchester
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

Source: STEAM; Scarborough Tourism Economic Activity Monitor, Global Tourism Solutions (UK) Ltd. If it would be useful to receive a copy of the STEAM 2016 reporting document, please contact: research@visitmanchester.com

EMPLOYMENT SUPPORTED

Marketing Manchester works with Global Tourism Solutions (UK) Ltd to provide an indication of the number of full-time equivalent roles supported by the visitor economy to include direct employment (within hosting businesses) and the indirect employment (within the supply chain). The following table shows the total FTEs supported by the activity in Greater Manchester, and also Manchester local authority.

	FTEs supported by Greater Manchester's Tourism Industry	FTEs supported by Manchester's Tourism Industry
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

Note: figures rounded to the nearest 100.

Source: STEAM; Scarborough Tourism Economic Activity Monitor, Global Tourism Solutions (UK) Ltd. If it would be useful to receive a copy of the STEAM 2016 reporting document, please contact: research@visitmanchester.com

VISITOR SPEND DISSEMINATION

Marketing Manchester commissioned the Greater Manchester Visitor Leisure Survey 2014, to update the intelligence on the leisure market that was gained through the previous 2007 and 2010 studies. Below is an overview of the visitor expenditure findings for Greater Manchester:

- A day visitor spent an average of £35.
- A staying visitor in paid-for accommodation spent an average of £97 per person per day including accommodation and £58 excluding accommodation.
- The £35 day visitor spend and £58 staying visitor spend refers to spending in shops, restaurants, entertainment venues, at attractions and on local transport within the destination.
- A visitor staying with friends and family spent £39 per day within the destination.

Source: Greater Manchester Leisure Visitors Survey 2014, undertaken by Bluegrass Research Limited. 757 sample across ten districts of Greater Manchester.

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

CONFERENCE & BUSINESS EVENTS SECTOR

The conference and business events sector plays an important role in the economic impact the destination generates to the local economy, both in terms of business revenue streams and in supporting jobs across a number of sectors.

In 2016, Marketing Manchester commissioned an update to the Conference Value & Volume study, to follow the 2010, 2012 and 2014 studies.

The 2016 study, reporting on the activity hosted in 2015, identified that:

- the value of the sector to Greater Manchester was £810m,
- 4.5m delegates were hosted equating to 7.4m delegate days.
- the average value of a day delegate (per trip) was £79, considering that a day delegate can be attending multiple days, whilst the average value of a staying delegate was £318 (per trip).
- Manchester district hosted 65% of the value of the sector to Greater Manchester and supported 66% of the total jobs.
- the sector was estimated to support 21,900 direct jobs within Greater Manchester and 40,100 jobs to the UK, when including the indirect jobs in the supply chain.
- September to November was the busiest 'quarter' for venues hosting such business

In addition to the sector profile (some of which is detailed above) the study also identified five key trends since the 2013 study:

- 14% growth in the number of events booked with Greater Manchester venues.
- 9% growth in the economic impact generated by delegates staying in the 'wider destination' (an accommodation provider not linked to the venue that hosted the core business event).
- Growth in the value of business coming from the northwest and overseas (4% and 11% respectively).
- Growth in non-corporate business, from representing 43% of the sector in 2013, to 48% in 2015. Non-corporate business includes; national association, international association and the not-for-profit sector.
- 9% decrease in the number of delegates attending a conference and business event in Greater Manchester, despite an increased number of bookings.

Source: Conference Value & Volume 2016 (reporting on 2015).

If it would be useful to receive a copy of the full findings please contact: research@visitmanchester.com

Please note that the Conference Value & Volume 2018 (reporting on 2017) was commissioned February 2018 with reporting due later this year.

VISITORS TO MANCHESTER – BENCHMARKING & VISITOR PROFILE

INTERNATIONAL VISITS

The Office of National Statistics, and supported by VisitBritain, undertake the International Passenger Survey that measures trends in inbound tourism to the UK.

MANCHESTER

- Manchester attracted 1.19m international visits in 2016, and Greater Manchester 1.38 million international visits.
- Manchester consistently receives the third most international visits to a UK destination behind London (1) and Edinburgh (2).
- The number of international visits to Manchester increased by 30% between 2006 and 2016, whilst Greater Manchester increased by 24%.

The following shows Manchester's performance amongst UK cities in 2016:

	All International Visits	International holiday visits only	International business visits only
1	London (19.1m)	London (9.3m)	London (3.6m)
2	Edinburgh (1.7m)	Edinburgh (1.1m)	Birmingham (593,980)
3	Manchester (1.2m)	Glasgow (335,280)	Manchester (388,960)
4	Birmingham (1.1m)	Inverness (291,320)	Liverpool (193,120)
5	Liverpool (670,550)	Manchester (271,500)	Bristol (186,700)

Note: The full list of visit categories are; business, holiday, VFR, study and other.

GREATER MANCHESTER

Of the 1.38m visits to Greater Manchester in 2016, 31% were business visits, 21% were holiday visits, 33% were visits to friends and relatives, 1% were study visits and 14% of visits were classed as 'other'.

295,010 of the 1.38m visits were for holiday purposes and below are the countries generating the most holiday visits in 2016:

1. Irish Republic 28,640
2. USA 27,420
3. Germany 21,280
4. Gulf CC 20,390
5. Australia 19,720
6. France 15,760
7. Italy 15,570
8. China 12,930
9. Spain 10,450
10. Switzerland 9,340

Source: International Passenger Survey 2016, Office for National Statistics and supported by VisitBritain.

Please note that Marketing Manchester has compiled an overview of the datasets concerning Greater Manchester and if this would be useful please contact: research@visitmanchester.com

DOMESTIC VISITS

STAYING VISITORS

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.

Manchester is the second most visited city or town in England by Great British residents on a staying visit (at 2.4m visits), behind London (with 12.1m visits). Birmingham and Scarborough are to follow.

Greater Manchester attracts 3.3m staying visits from Great British residents, to include 985,000 visits for holiday purposes. 793,000 of these 985,000 visits are to Manchester.

These 793,000 holiday visits places Manchester as the fourth most visited city or town for holiday purposes, behind London (3.8m), Scarborough (1.3m) and Blackpool (1.0m).

Source: Great Britain Tourism Survey, VisitEngland, using a 2014-16 average.

DAY VISITORS

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

The study estimates that Greater Manchester attracts 57.8m day visits per year from Great British residents, and this includes 31.3 million to Manchester local authority making it the second most visited local authority for tourism day visits, behind the City of London with 43.1 visits.

Source: Great Britain Day Visits Survey, VisitEngland, using a 2014-16 average.

ICCA RANKINGS

In 2016 Manchester hosted 27 ICCA-ranked events resulting in a global ranking of 94th, a European ranking of 50th, and a UK ranking of 4th (behind London, Edinburgh & Glasgow).

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 Rankings 2016, International Congress & Convention Association.

VISITOR PROFILE

Marketing Manchester commissioned the Greater Manchester Leisure Visitor Survey 2014 to provide an updated intelligence base to the previous studies.

The study involved face-to-face interviews across the ten districts of Greater Manchester and the findings are as below:

- The geographic markets generating the highest levels of visitors were the North West (41%), followed by; Yorkshire & The Humber (7%); and the East Midlands (5%). The North East, West Midlands, Greater London, the South East, the South West and Wales each accounted for 4% of the overall visits.
- The North West generated 64% of day visits, followed by Yorkshire & The Humber (9%) and the East Midlands (5%). The North East and the West Midlands both produced 4% of the day visits sampled.
- The North West generated the highest proportion of staying visits, at 10% followed by the South East at 8%. Greater London, Scotland and the South West each generated 6% and the North East, West Midlands, East Midlands and Wales all generated 5%.
- Half of all visitors to Greater Manchester were under 44 years of age (49%) and the 2014 study noted a rise in the share of 65+ visitors (to 16%) when compared to previous studies.
- The average group size was 2.9 (unchanged from 2010); 2.2 adults and 0.7 children. 44% were in a family group, 21% with their partner, 17% with friends, 14% travelled alone and 4% with an 'other' group type.
- 30% of visitors to Greater Manchester were first-time visitors, 64% had also visited in the last two years and 6% had previously visited over two years earlier. 44% of staying visitors were first-time visitors and 20% of day visitors.
- 70% of leisure visits to Greater Manchester required paid-for accommodation and 30% stayed with friends and relatives, this compares to 75% and 25% respectively for Manchester city centre.
- The average length of stay for staying visitors to Greater Manchester was 3.4 nights; 2.9 nights for those staying in paid-for accommodation and 4.5 nights for those staying with friends and family. The 3.4 nights also varies between 2.3 for domestic staying visitors and 5.1 for overseas staying visitors.

Source: Greater Manchester Leisure Visitors Survey 2014, undertaken by Bluegrass Research Limited. 757 sample across ten districts of Greater Manchester.

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

VISITORS TO MANCHESTER – MOTIVATIONS

VISITOR MOTIVATIONS - LEISURE

The following provides an overview of the intelligence gained through the 2014 survey on motivations to visit Greater Manchester:

- Nearly a quarter of staying visits (24%) reported the primary motivation to visit as being 'just to have break and a trip away' and 15% of day visitors said the same. Therefore a higher proportion of day visits were motivated by a specific purpose and the findings showed that higher proportions of day visits (to staying visits) were motivated by a specific attraction, a specific exhibition or shopping.
- In addition to the 24% of staying visitors motivated by the general need of 'a break or a trip away' there was also an additional 9% whose motivation was to explore the city or town (compared to just 2% of day visits). Therefore 33% of staying visits are looking for options of things to see and do.
- Manchester city centre had an increased proportion of visitors who are motivated to visit by shopping and also of those wanting to generally explore the destination. The wider Greater Manchester sample had higher incidences of those motivated to visit due to a specific attraction, event or festival.
- Higher incidences of visitors travelling with their family or a group of friends were evidenced at attractions and museums and higher incidences of those travelling with their partners were evidenced for those with the primary motivation of being 'to visit a specific exhibition'. Those travelling within a group (either friends or family) were more likely, than other visitor group types, to be going to see a theatre show. Visiting 'just for a break' and 'to shop' had more general appeal across all visit group types.
- In terms of activities undertaken during a visit to Greater Manchester; 23% visited the shops; 17% would eat out and 5% reported that they would spend time in bars and clubs. This increases for visitors to Manchester city centre, with 28% visiting the shops, 18% eating out and 7% spending in bars and clubs.
- Although the primary reason for booking of 'visiting museums and galleries' showed a higher incidence for day visits, when looking at all activities undertaken during a visit, visiting museums and galleries had a higher incidence within staying visits.
- 16% of staying visitors incorporated more than one district into their visit compared to just 1% of day visitors, where time available for moving about the sub-region is limited.

Source: Greater Manchester Leisure Visitors Survey 2014, undertaken by Bluegrass Research Limited. 757 sample across ten districts of Greater Manchester.

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 EXPERIENCE SATISFACTION - LEISURE

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

The latest visitor survey that gained feedback during 2014; the Greater Manchester Leisure Visitor Survey 2014, showed that at least half of visitors rated 'excellent' for seven out of eight 'product categories' with particular strengths identified as the 'cultural offer' (theatres, galleries and museums) and shopping.

Pubs, bars and nightlife, events and festivals, eating offer, sports programme and family activities also received strong satisfaction levels equivalent to over 4 out of 5, with the availability of green spaces being the final category, and scoring lower.

The nine destination features tested tended to receive lower counts of visitors reporting 'excellent' and therefore identified a greater level of potential for improvement.

Visitors were most satisfied with the public transport services and routes within GM to get around, the welcome and service received during their visit, and the feeling of safety. Good satisfaction levels were also received for; access to the countryside; signage for getting around on foot and the availability of car parking.

Overall, GM was rated an average of 4.5 out of 5 as a visitor destination, which is consistent with the 2010 study with 12% of visitors reporting that their expectations had been exceeded.

Source: Greater Manchester Leisure Visitors Survey 2014, undertaken by Bluegrass Research Limited. 757 sample across ten districts of Greater Manchester.

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 – CONFERENCES & BUSINESS EVENTS

The biennial Conference Value & Volume provides information on the nature of the conferences and business events hosted within Greater Manchester venues.

The latest study (reporting on 2015) shows:

- 52% of business events hosted in Greater Manchester are from the corporate sector, 28% from the public/government sector, 17% from the National Association sector and 4% from International Associations.
- In terms of economic impact this business translates into 43% from the corporate sector, 29% from national association events, 16% from the public/government sector and 11% from international association events.
- Greater Manchester experiences peaks in activity within specific locations to include boosts in activity from the corporate sector at the Quays and boosts to national association activity within Petersfield.
- The key period of activity within the conference and business events sector is September to November with boosts also experienced in March and June. However the conference and business events market generates business within the sector, through venue hire and accommodation bookings, throughout the year.
- Out of the 4.5m delegates hosted within Greater Manchester, 1.9m delegates were staying delegates and 2.6m were day delegates (to include single day events and multiple-day business events were overnight accommodation is not required).

Source: Conference Value & Volume 2016 (reporting on 2015), undertaken by TEAM Tourism Consulting. If it would be useful to receive a copy of the full findings, please contact: research@visitmanchester.com

Please note that the Conference Value & Volume 2018 (reporting on 2017) was commissioned February 2018 with reporting due later this year.

STAYING VISITS TO GREATER MANCHESTER

Where national studies enable destinations to gain an indication on how they rank, Greater Manchester commissions STEAM (Scarborough Tourism Economic and Activity Monitor), from Global Tourism Solutions, to provide detail on the volume of staying visits and the associated value to the economy. STEAM utilises both supply information (accommodation stock) and demand information (occupancy rates) to provide an indication of the number of staying visits and their value to Greater Manchester. Supply information is provided on page 5 of this document.

For information on hotel performance levels (occupancy and revenue rates) please contact: research@visitmanchester.com

The leisure short breaks market, conference delegates and other business visits provide a baseline occupancy level that is then further boosted by guests visiting 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; sporting events at Emirates Old Trafford and Sportcity, and cultural events and festivals. For further information on forthcoming events likely to produce high demand for rooms please contact: research@visitmanchester.com

MOST VISITED ATTRACTIONS

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MOST VISITED ATTRACTIONS

Below are the overall top 20 most visited attractions within Greater Manchester, with the most visited attractions split by free admittance and paid entry to follow.

MOST VISITED ATTRACTIONS 2016				
	Attraction	District	Annual Total	Admittance
1	The Lowry	Salford	846,097	Free*
2	HOME	Manchester	837,621	Free*
3	Museum of Science & Industry	Manchester	651,473	Free*
4	Manchester Art Gallery	Manchester	593,168	Free
5	National Football Museum	Manchester	481,541	Free
6	Manchester Museum	Manchester	406,997	Free
7	Bolton Museum, Aquarium & Archive	Bolton	354,653	Free
8	Runway Visitor Park	Manchester	338,450	Free*
9	The Whitworth	Manchester	321,269	Free
10	Manchester United Museum & Tour Centre	Trafford	313,812	Paid entry
11	Dunham Massey	Trafford	285,637	Paid entry
12	IWM North	Trafford	281,919	Free
13	The John Ryland's Library	Manchester	242,892	Free
14	East Lancashire Railway & Bury Transport Museum	Bury	201,916	Paid entry
15	Manchester Cathedral	Manchester	176,704	Free
16	Portland Basin Museum	Tameside	114,207	Free
17	Gallery Oldham	Oldham	110,491	Free
18	Salford Museum & Art Gallery	Salford	104,701	Free
19	People's History Museum	Manchester	93,404	Free

Accompanying notes
Attractions submitting data into the STEAM process with an annual figure of 65,000+ have been included in these tables.
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 are free to enter.

MOST VISITED FREE ADMITTANCE ATTRACTIONS 2016 (over 100,000 visits)				
	Attraction	District	Annual Total	Admittance
1	The Lowry	Salford	846,097	Free*
2	HOME	Manchester	837,621	Free*
3	Museum of Science & Industry	Manchester	651,473	Free*
4	Manchester Art Gallery	Manchester	593,168	Free
5	National Football Museum	Manchester	481,541	Free
6	Manchester Museum	Manchester	406,997	Free
7	Bolton Museum, Aquarium & Archive	Bolton	354,653	Free
8	Runway Visitor Park	Manchester	338,450	Free*
9	The Whitworth	Manchester	321,269	Free
10	IWM North	Trafford	281,919	Free
11	The John Ryland's Library	Manchester	242,892	Free
12	Manchester Cathedral	Manchester	176,704	Free
13	Portland Basin Museum	Tameside	114,207	Free
14	Gallery Oldham	Oldham	110,491	Free
15	Salford Museum & Art Gallery	Salford	104,701	Free
16	People's History Museum	Manchester	93,404	Free

MOST VISITED PAID ENTRY ATTRACTIONS 2016				
	Attraction	District	Annual Total	Admittance
1	Manchester United Museum & Tour Centre	Trafford	313,812	Paid entry
2	Dunham Massey	Trafford	285,637	Paid entry
3	East Lancashire Railway & Bury Transport Museum	Bury	201,916	Paid entry
4	Breakout Manchester	Manchester	61,895	Paid entry
5	iFLY	Trafford	51,876*	Paid entry
6	BBC Tours at MediaCityUK	Salford	25,321	Paid entry
7	Museum of Transport	Manchester	19,066	Paid entry

*Represents those participating in the experience only, and excludes wider footfall to the centre.

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ACCOMMODATION PROVISION

CURRENT PROVISION

GREATER MANCHESTER

Greater Manchester closed 2017 with over 23,800 rooms and by the end of 2018 this room count is expected to reach 25,000. The following provides a breakdown on current stock levels:

Property Type	No. of properties	No. of rooms
Hotel: 5 star	3	488
Hotel: 4 star	42	7,003
Hotel: 3 star	105	10,734
Hotel: 1 or 2 star	40	2,963
Hotel: Unaccredited /tbc/unknown	11	203
Guest Accommodation (B&B, guest house, inn)	106	1,169
Self-catering units (Apartment, cottage, house)	61	103
Serviced apartments	28	1,284
Total	396	23,947

MANCHESTER CITY CENTRE

At the close of 2017 there were over 9,350 rooms in Manchester city centre and by the end of 2018 this room count is expected to reach 10,540 rooms. The following provides a breakdown on current stock levels:

Property Type	No. of properties	No. of rooms
Hotel: 5 star	2	323
Hotel: 4 star	20	3,813
Hotel: 3 star	16	3,161
Hotel: 1 or 2 star	13	1,178
Hotel: Unaccredited/tbc/unknown	1	16
Guest Accommodation (B&B, guest house, inn)	8	81
Self-catering units (Apartment, cottage or house)	15	18
Serviced apartments	18	916
Total	93	9,506

Source: Accommodation Counts Master xls 13/02/2018.

Notes
1: The stock counts include room changes until 13 February 2018.
2: There is also additional accommodation provision within hostels, camping and caravanning sites and university summer lets.
3: In addition to the stock recorded as Manchester City Centre there is additional provision just outside the Manchester/Salford border, in a number of hotels, to include 5 star accommodation at The Lowry.

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 (114 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 (302 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 so far has brought the opening of The Cow Hollow Hotel (16 rooms) in January and the opening of Roomzzz Manchester Corn Exchange in February (114 rooms).

HOTELS IN THE PIPELINE

5,236 new rooms are confirmed for Greater Manchester from new openings and property extensions, a growth of 22% on the current supply. In terms of Manchester city centre, a planned 3,915 rooms are due to come on board that would increase the current supply by 42%.

The following developments are those due to open in 2018, along with their expected timescales. Please note that these are to the best of our knowledge and are subject to change.

	Hotel & Location	Rooms	Expected Opening
1	Haigh Hall (Contessa Hotels) Phase 2 of 2 Haigh Hall Country Park, Wigan	19	May 2018
2	Crowne Plaza Manchester Oxford Rd. 55 Booth Street West, Manchester, M15 6PQ.	212	May 2018
3	Staybridge Suites Manchester Oxford Rd. 30 Higher Chatham Street, Manchester, M15 6ED	116	May 2018
4	AC by Marriott Manchester City Centre Cable Street/Mason Street, New Cross, Manchester.	172	June 2018
5	The Stock Exchange Hotel Stock Exchange, 4 Norfolk Street, Mcr.	40	August 2018
6	Locke by Saco Princess Street (Atrium site), Manchester.	150	August 2018
7	Go Native London Warehouse 51 Ducie Street, M1 2TP	166	Sept. 2018
8	Indigo Manchester Hotel City Buildings, Corporation Street/Todd Street	178	Autumn 2018

HOTELS IN THE PIPELINE (cont)

The following are also confirmed builds for hotels, and with timescales to follow:

	Hotel & Location	Rooms
9	CitySuites (2nd property) Embankment West, Greengate, Salford.	147 rooms
10	Dakota Manchester (deluxe) Ducie Street, Manchester.	137 rooms
11	Go Native Serviced Apartments Kampus, Aytoun Street, Manchester	533 apartments
12	Hampton by Hilton Manchester City Centre Sharp Street, off Rochdale Rd, Manchester.	221 rooms
13	Holiday Inn Express Central Park Plaza Oldham Road, Manchester.	120 rooms
14	Hotel Brooklyn (Bespoke Hotels) Portland Street (next to Townhouse property), Mcr.	183 rooms
15	Leonardo Hotel Manchester John Dalton House, John Dalton Street, Manchester.	215 rooms
16	Mollie's Motel & Diner Former Granada Studios, St. John's development.	210 rooms
17	Motel One Three St. Peter's Square St. Peter's Square, Manchester, M2 3DF	328 rooms
18	MOXY by Marriott - Manchester Invicta House, Atkinson Street, Spinningfields.	145 rooms
19	Nadler Manchester (The) St. John's Place Tower, St. John's, Manchester.	110 rooms
20	StayCity Manchester Three St. Peter's Square St. Peter's Square, Manchester, M2 3DF	262 rooms/apts
21	Staying Cool 40 Chorlton Street, Manchester.	41 apartments
22	Stay Inn Manchester (extension) (existing property) Blackfriars Road, Salford.	130 rooms
23	Victoria Warehouse (extension) (existing property) Trafford Wharf Road, Trafford.	400 (additional) rooms
24	Zetter Hotel Manchester (The) London Road Fire Station, London Road, Manchester.	91 rooms
25	(TBC), Circle Square, Oxford Rd, Manchester.	150 rooms
26	(TBC) St. Michael's, Manchester.	216 rooms
27	(TBC), Irish World Heritage Centre, M8 0AE	135 rooms
28	(TBC – Signature Living) 123-125 Liverpool Road (former Commercial Hotel)	39 rooms
29	(TBC) Rock Street, Oldham	70 rooms
30	(TBC) Trafford Waters.	300 rooms

These confirmed properties are plotted at:
https://drive.google.com/open?id=1LqeJD_CknjE4kELUbRPDdzwRTOUexf8K&usp=sharing

There are also additional sites seeking planning permission but these are yet to be confirmed.

Last updated: 19/02/2018.

FURTHER 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/

THE CORPORATE MARKET

We work closely with New Economy and the Greater Manchester Combined Authority who can provide further information on Greater Manchester's economy, its key sectors, and its key employers. This can often provide context for businesses whose market mix/guests/users include the corporate market and therefore please let us know if you would benefit from being directed to such information.

ACCOLADES

- 2018: Manchester named 7th most exciting city by the Time Out City Life Index:
https://www.timeout.com/london/citylifeindex
- 2017: Manchester was ranked as one of the 'top 15 unforgettable cities to visit before you turn 30' by New York-based Thrillist,
https://www.thrillist.com/travel/nation/best-cities-in-the-world-to-visit-before-30
- 2017: Manchester was ranked as 16th in the Hotel Investment Attractiveness Index (Europe) by Colliers
http://www.colliers.com/-/media/files/emea/emea/emea-hotel-city-index_2017web.pdf?la=en-gb
- 2017: Manchester was ranked as the 5th least volatile city in the European Hotel Valuation Index 2016 by HVS.
https://www.hvs.com/article/7941/2017-european-hotel-valuation-index

FUTURE RESEARCH

Greater Manchester is currently undertaking its bi-annual Conference Value & Volume study with reporting due approximately July 2018. Marketing Manchester is also currently working in partnership with Manchester Hoteliers Association to scope research into the staying visitor market with details to follow.

Activity on the annual STEAM programme, hotel performance and hotel pipeline trajectory continues.

GLOSSARY OF LOCATION DEFINITIONS

- Manchester city centre – The area indicated on the second map at
https://www.visitmanchester.com/dbimgs/New%20Map%20Layout%20Oct%2016_LOW.pdf
- 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.

CONTACT DETAILS

If you require further information that is not available at: http://www.marketingmanchester.com/who-we-are/visit-manchester/vm-research.aspx please contact Jo Cuff at research@visitmanchester.com

Marketing Manchester is the agency charged with promoting Greater Manchester on the national and international stage to key sectors including; media, digital and tech; science; advanced manufacturing; financial and professional services; tourism; culture; and sport. As part of the Manchester Growth Company, Marketing Manchester undertakes marketing and communications on behalf of the group in support of the Greater Manchester Strategy. Visit Manchester is the tourist board for Greater Manchester and is a division of Marketing Manchester.

Latest available figures published February 2018