MAY 2017

- 80% monthly occupancy in GM (77% YTD)
- 81% monthly occupancy in MCC (79% YTD)

Sample

GM
128 properties
16,571 rooms

MCC
44 properties
7,944 rooms

Sample caveat

The sample is expanded each January if further properties become available for inclusion and therefore there are some sampling variations between years.

OCCUPANCY – MONTHLY OVERVIEW

	May 2017	May 2016
Greater Manchester (GM)	80%	77%
Manchester city centre (MCC)	81%	76%
Manchester city centre - weekend	84%	82%
Manchester city centre - weekday	80%	74%

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

May's occupancy usually performs just under the annual average so could be considered as an off-peak month. In 2017, May followed April's positive trend with both months providing record occupancy levels for both Greater Manchester and Manchester city centre (since records began in 2010 for GM and 2000 for the city centre). These levels mean that, on average, 8 out of 10 hotel rooms and apartments continue to be full across Greater Manchester, per night.

The average occupancy rates of 80% (for GM) and 81% (for MCC) compare with 77% for GM and 76% for the city centre in 2016, demonstrating a strong month for the city centre particularly. The May data also confirms the seventh consecutive month where occupancy levels were boosted on the same month of the previous year for Manchester city centre, whilst for Greater Manchester, levels were boosted for the fifth consecutive month.

Daily occupancy rates are monitored for Manchester city centre and data for May suggested a weekend/weekday split of 84%/80%.

YTD HOTEL PERFORMANCE

Year-to-Date (Jan-May)	**Greater Manchester**	**Manchester city centre**
Occupancy rate	77%	79%
Average Daily Rate (ADR)	£73	£83
Revenue Per Available Room (RevPAR)	£56	£65

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Please note that both samples include properties of 2 to 5 star accreditation, or equivalent.

MAY 2017

- 23,222 available rooms in GM
- 9,190 available rooms in Manchester city centre

MONTHLY OCCUPANCY PEAKS

Occupancy rates in Greater Manchester (GM) are driven by activity in a number of markets. Manchester city centre is then further boosted by events taking place across the city's venues.

Seven dates provided an occupancy rate of 90% or above, within the city centre, and the most significant peaks in occupancy are referenced below, along with some of the main events occurring on these dates.

Occupancy	Day/Date	Events
97%	Wed. 10 May	Manchester Central hosted the first day of the two day British Insurance Brokers Association (BIBA) and Emirates Old Trafford hosted Lancashire Lightning v Worcestershire Rapids in the Royal London One Day Cup.
96%	Tues. 16 May	Manchester City FC held their last home game of the season at the Etihad Stadium, Manchester Arena hosted Harry Potter & The Philosopher's Stone and Manchester Central hosted the Association of Corporate Treasurers (ACT).
96%	Tues. 09 May	This is the night before both the Lancashire Lightning v Worcestershire Rapids One Day Cup at Emirates Old Trafford and also the British Insurance Brokers Association conference (BIBA).

CURRENT SUPPLY

As occupancy levels are a measure of how well demand is meeting supply, the levels of supply are monitored to provide context on demand growth. For example, when an 80% daily occupancy rate is achieved in a market with 21,000 rooms, 16,800 rooms are sold per night but when a 78% daily occupancy rate is achieved in a market with 22,000 rooms 17,160 rooms are sold per night.

The latest intelligence shows the level of supply at the end of May 2017 as:

GM supply

390 properties
23,222 rooms

MCC supply

91 properties
9,190 rooms

Notes:

1. Property and room counts include; hotels, guest houses, B&Bs, serviced apartments and self-catering providers, and exclude; accommodation with Airbnb, hostels, caravan parks and summer university lets.
2. Stock counts are updated for most properties on a continuous basis, where information is available. This is supplemented by a comprehensive stock count for the ten local authorities of the GMCA undertaken during the annual STEAM process.

MAY 2017

Visit Manchester, part of Marketing Manchester, is the tourist board for Greater Manchester.

Visit Manchester collects information on demand and supply factors to facilitate an increased understanding of the tourism market and associated activity.

SUPPLY & DEMAND

The additional supply that has opened between the end of May 2016 and May 2017 include: Premier Inn Manchester Salford Media City; Travelodge Sale; Travelodge Stockport; Holiday Inn Express Stockport; which all opened in 2016, and CitySuites in Salford, Oddfellows in The Park in Stockport, easyHotel Manchester, Parkhill Apartments in Salford, Staycity Manchester Piccadilly and Holiday Inn Express TRAFFORDCITY in 2017. During the period there was also the closure of The Place Aparthotel with 107 apartments. This equates to a net gain of 1,078 rooms.

The table below includes the referenced properties above and provides an approximate indication of how demand levels in May 2017 compared with those of May 2016.

	May 2017	May 2016
Greater Manchester occupancy rate*	80%	77%
No. of rooms available per night**	23,222	22,144
No. of days in month	31	31
No. of room nights available in month	719,882	686,464
Approximate number of rooms sold in month**	575,906	528,577
Difference in rooms sold during the month	+ 47,329 rooms	

*The occupancy rate is significantly driven by serviced accommodation of 50+ rooms and this has been applied to all stock for indication purposes.
** The 2017 room count includes the change in rooms (+1,078) and reflects the best of our knowledge at this time.

This indication suggests that approximately 47,329 additional room nights were sold across Greater Manchester in May 2017, compared to May 2016.

SUPPLY PIPELINE

2017 has so far brought an additional 698 rooms to market (net) and before the end of the year, a further 579 rooms (net) across Greater Manchester are expected to open, based on current construction timeframes. Please note that this takes into account the loss of The Atrium in June and also the additional rooms from the pipeline properties listed below.

Property	Local Authority	No. of rooms
Motel One Manchester – Royal Exchange	Manchester	302 rooms
Haigh Hall Hotel	Wigan	30 rooms
Holiday Inn Express Wigan	Wigan	82 rooms
The Cow Hollow Hotel	Manchester	17 rooms
Hilton Garden Inn Emirates Old Trafford	Trafford	150 rooms
Roomzzz Manchester Corn Exchange	Manchester	114 rooms
Additional rooms expected during 2017:		**695 rooms**

These 1,277 rooms is almost a 7% increase in a twelve month period.

For further information relating to tourism intelligence in Greater Manchester please contact: research@visitmanchester.com