JULY 2017

- 83% monthly occupancy in GM (78% YTD)
- 81% monthly occupancy in MCC (79% YTD)

Sample

GM
127 properties
16,455 rooms

MCC
43 properties
7,828 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

	July 2017	July 2016
Greater Manchester (GM)	83%	83%
Manchester city centre (MCC)	81%	81%
Manchester city centre - weekend	87%	85%
Manchester city centre - weekday	80%	81%

July's occupancy usually performs stronger than the annual average, for both geographies, but particularly so in the wider Greater Manchester area. This therefore makes July one of the peak months of the year.

June 2017 had been the first full month to follow the 22 May terror attack that occurred in Manchester and showed a reduced level of occupancy. July's figures indicate a pick-up in occupancy, with rates of 83% in Greater Manchester and 81% in Manchester city centre, matching 2016 levels. When applied to increased stock levels in 2017, this results in a positive boost to the city, on 2016, but at a lower rate than the first four months of the year.

The daily occupancy rates that are monitored for Manchester city centre suggest a weekend/weekday split of 87%/80%.

YTD HOTEL PERFORMANCE

Year-to-Date (Jan-July)	Greater Manchester	Manchester city centre
Occupancy rate	78%	79%
Average Daily Rate (ADR)	£74	£83
Revenue Per Available Room (RevPAR)	£58	£66

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

JULY 2017

- 23,410 available rooms in GM
- 9,376 available rooms in Manchester city centre

MONTHLY OCCUPANCY PEAKS

Occupancy rates in Greater Manchester 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.

July saw the return of the biennial Manchester International Festival (held 29 June to 16 July) and therefore additional events from the programme were scheduled for the first few weeks of the month.

Twelve dates in the city centre provided an occupancy rate of 90% or above 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
98%	Tues. 04 July	Radiohead performed at Emirates Old Trafford whilst Manchester Central hosted the Microscience Microscopy Congress 2017 and the 10th Annual Patient Congress. Some events on the Manchester International Festival programme also ran on this date.
96%	Tues. 18 July	This was the opening night of the Manchester five-night run of Dirty Dancing at The Palace Theatre and the final day of the Manchester Furniture Show at Manchester Central.
96%	Wed. 19 July	The National Speedway Stadium hosted games in the national league, Dirty Dancing continued its run at The Palace Theatre and Manchester Metropolitan University and the University of Manchester co-hosted ISPA (International School Psychology Association). Tatton Park, just south of the Greater Manchester border, hosted the RHS Flower Show.

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 data. 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 July 2017 as:

GM supply
390 properties
23,410 rooms

MCC supply
91 properties
9,376 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.

JULY 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 July 2016 and July 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, Holiday Inn Express TRAFFORDCITY and Motel One Manchester Royal Exchange in 2017. During the period there were also the closures of The Place Aparthotel and The Atrium. This equates to a net gain of 1,264 rooms.

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

	July 2017	July 2016
Greater Manchester occupancy rate*	83%	83%
No. of rooms available per night**	23,410	22,146
No. of days in month	31	31
No. of room nights available in month	725,710	686,526
Approximate number of rooms sold in month**	602,340	569,817
Difference in rooms sold during the month	+ 32,523 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 (+1,264) and reflects the best of our knowledge at this time.

This indication suggests that approximately 32,523 additional room nights were sold across Greater Manchester in July 2017, compared to July 2016. This compares to an additional 10,406 room nights in June 2017, compared to June 2016.

SUPPLY PIPELINE

2017 has so far brought an additional 884 rooms to market (net) and before the end of the year, a further 393 rooms (net) across Greater Manchester are expected to open, based on current construction timeframes. Please note that these net figures take into account the room losses at The Place Aparthotel and The Atrium.

Property	Local Authority	No. of rooms
Hilton Garden Inn Emirates Old Trafford	Trafford	150 rooms
Haigh Hall Hotel	Wigan	30 rooms
Holiday Inn Express Wigan	Wigan	82 rooms
Roomzzz Manchester Corn Exchange	Manchester	114 rooms
The Cow Hollow Hotel	Manchester	17 rooms
Additional rooms expected before the end of 2017:		**393 rooms**

These 1,277 rooms represent an increase of almost 6%, in the twelve month calendar period.

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