JUNE 2017

- 80% monthly occupancy in GM (78% YTD)
- 79% 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

	June 2017	June 2016
Greater Manchester (GM)	80%	83%
Manchester city centre (MCC)	79%	81%
Manchester city centre - weekend	82%	84%
Manchester city centre - weekday	78%	81%

June's occupancy usually performs stronger than the annual average (both within the city centre and across Greater Manchester) and is one of the peak months of the year.

However, June 2017 is the first full month following the terror attack that occurred in Manchester 22 May and the figures reflect the consequential impact from this. June's occupancy rates of 80% (GM) and 79% (Manchester city centre), compare with 83% and 81% respectively, from June 2016, and halts the continued growth in occupancy rates that had been experienced, for seven months in the city centre, and five months for the wider Greater Manchester area.

The daily occupancy rates that are monitored for Manchester city centre suggest a weekend/weekday split of 82%/78%.

YTD HOTEL PERFORMANCE

Year-to-Date (Jan-June)	**Greater Manchester**	**Manchester city centre**
Occupancy rate	78%	79%
Average Daily Rate (ADR)	£74	£84
Revenue Per Available Room (RevPAR)	£57	£66

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

JUNE 2017

- 23,408 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.

Seven 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
97%	Tues. 27 June	Manchester Central hosted the Chartered Institute of Housing Annual Conference and Exhibition, and the Developing Excellence in Medical Education Conference. The University of Manchester also held the 48th British Association of Crystal Growth Conference, whilst the Trafford Business Expo was at Emirates Old Trafford.
96%	Sat. 03 June	Robbie Williams performed at the Etihad Stadium, and this was also the night before the One Love Manchester 22/05 benefit conference at Emirates Old Trafford and Michael Carrick's testimonial at Old Trafford Football Ground. Also, the King Street Festival (city centre), the Small Engines Weekend (ELR Bury), the Tatton Park Classic Car Spectacular and the Stockport Beer & Cider Festival also took place this weekend.
95%	Wed. 28 June	Manchester Central continued to host the Chartered Institute of Housing Annual Conference and Exhibition and Developing Excellence in Medical Education Conference. The University of Manchester also held the 48th British Association of Crystal Growth Conference.

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 June 2017 as:

GM supply
390 properties
23,408 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.

JUNE 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 June 2016 and June 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 was also the closure of The Place Aparthotel, and most recently, 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 June 2017 compared with those of June 2016.

	June 2017	June 2016
Greater Manchester occupancy rate*	80%	83%
No. of rooms available per night**	23,408	22,144
No. of days in month	30	30
No. of room nights available in month	702,240	664,320
Approximate number of rooms sold in month**	561,792	551,386
Difference in rooms sold during the month	+ 10,406 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 10,400 additional room nights were sold across Greater Manchester in June 2017, compared to June 2016, despite the consequential impact of the terror attack. However this increase of 10,400+ rooms sold compares with an increase of 47,300+ rooms sold during the previous month of May.

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