

ONE STOP INTELLIGENCE DOCUMENT – GREATER MANCHESTER’S TOURISM SECTOR 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 data shows that tourism activity in Greater Manchester supports £9bn economic impact including £4.86bn generated in Manchester local authority. Tourism activity in Greater Manchester also supports 100,700 FTE jobs including 53,400 supported by the activity generated within Manchester local authority.

	Economic impact of tourism activity in Greater Manchester	Economic impact of tourism activity in Manchester City Local Authority
2020	(due to be available Dec. 2021)	(due to be available Dec. 2021)
2019	(due to be available Nov. 2021)	(due to be available Nov. 2021)
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

	FTEs supported by tourism activity in Greater Manchester	FTEs supported by tourism activity in Manchester City Local Authority
2020	(due to be available Dec. 2021)	(due to be available Dec. 2021)
2019	(due to be available Nov. 2021)	(due to be available Nov. 2021)
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

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

STEAM also provides information on arrivals, bednights, visitor numbers and other volume measures. 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 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 – BYTYPE 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 association delegate	-	-	£333	2
Leisure visitor staying in paid-for accommodation	£130	2.70 nights	£351	1
International leisure (non-VFR) from USA	£150	2.9 nights	£437	3
Average international leisure (non-VFR) visitor	£126	3.7 nights	£466	3
International leisure (non-VFR) from Gulf Co-operation Countries	£110	7.2 nights	£795	3
International leisure (non-VFR) from China	£136	6.1 nights	£829	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 2019; 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

INTERNATIONAL VISITS TO GREATER MANCHESTER

BENCHMARKING

Of the 1.89m international visits to Greater Manchester in 2019, 1.7m 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 (21.7m)	London (11.1m)	London (4.0m)
2	Edinburgh (2.2m)	Edinburgh (1.6m)	Birmingham (530,870)
3	Manchester (1.7m)	Manchester (563,620)	Manchester (432,450)
4	Birmingham (1.1m)	Glasgow (404,100)	Edinburgh (183,290)
5	Liverpool (844,560)	Liverpool (381,750)	Bristol (137,550)

Note: data is also available for visiting friends and relatives, study and miscellaneous.

TOP FIVE MARKETS TO GREATER MANCHESTER

The following are the markets generating the highest volume of visitors to Greater Manchester.

	All international visits	International holiday visits only	International holiday & miscellaneous visits
1	Irish Republic (161,830)	China (56,260)	Irish Republic (103,500)
2	Germany (146,060)	Irish Republic (54,340)	Germany (64,780)
3	USA (131,210)	Germany (49,090)	China (60,200)
4	Spain (115,620)	USA (43,410)	USA (56,450)
5	Poland (95,080)	Spain (42,970)	Spain (47,640)

Note: the miscellaneous category includes trips made specifically to 'spectate football' and is particularly relevant to the Greater Manchester dataset. The full list of trip types categorised as 'miscellaneous' is available on the website of the Office of National Statistics.

Data is also available on total market spend, average length of stay, average spend per visitor and season of visit and please e-mail research@visitmanchester.com if you require further information.

Please note that the International Passenger Survey methodology was modified in 2019 and new data is available for historic years using the new methodology. More information is available on the Office of National Statistics website.

Source: International Passenger Survey 2019, Office for National Statistics and supported by VisitBritain.

DOMESTIC VISITS - BENCHMARKING

STAYING VISITS

VisitEngland undertakes 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 Cornwall local authority is the most visited in England for domestic staying visits, followed by Manchester, Birmingham, and Liverpool.

Greater Manchester is the fifth most visited county in England for domestic staying visits, behind London, Devon, North Yorkshire, and Cornwall.

Source: Great Britain Tourism Survey, VisitEngland, using a 2017-19 average.

DAY VISITS

VisitEngland undertakes 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 City of London local authority receives the most day visits in England, followed by Manchester local authority and then Birmingham.

Greater Manchester is the second most visited county, behind London, followed by West Midlands.

Source: Great Britain Day Visits Survey, VisitEngland, using a 2017-19 average.

ICCA RANKINGS – CONFERENCE & BUSINESS EVENTS

In 2019 Manchester hosted 35 ICCA-ranked events resulting in a global ranking of 82nd and a UK ranking of 4th (behind London, Edinburgh and Glasgow).

City rankings are currently paused from 2020, due to the impact of the Coronavirus.

Note: An ICCA-ranked event 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 2019, International Congress & Convention Association.

VISITOR PROFILE – STAYING v DAY VISITS

Marketing Manchester uses the STEAM (Tourism Economic Activity Monitor) model to measure tourism activity within each local authority of Greater Manchester. In terms of the volume outputs and the visitor profile, the latest data shows:

- 11.8m staying visits and 111.7m day visits were made to Greater Manchester in 2018.
- For every staying visit made, there were approximately nine day visits made.
- For every staying visitor within the destination there were approximately four day visitors (due to length of stay).

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

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.
- 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 from 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 latest 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. Please contact: research@visitmanchester.com for further information.

THE LEISURE VISITOR – THE VISITOR EXPERIENCE

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

MOST VISITED ATTRACTIONS 2019

	Attraction	District	Annual Total	Admittance
1	The Lowry	Salford	863,428	Free*
2	HOME (Greater Manchester Arts Centre Ltd)	Manchester	848,033	Free*
3	Manchester Art Gallery	Manchester	750,216	Free
4	Science and Industry Museum	Manchester	556,267	Free*
5	Manchester Museum	Manchester	368,748	Free
6	Bolton Museum	Bolton	362,577	Free
7	Dunham Massey	Trafford	340,235	Paid entry
8	The Whitworth	Manchester	327,871	Free
9	Manchester United Museum & Tour Centre	Trafford	310,807	Paid entry
10	Runway Visitor Park Manchester Airport	Manchester	290,013	Free*
11	Imperial War Museums	Trafford	244,564	Free
12	Manchester Cathedral	Manchester	198,461	Free
13	National Football Museum	Manchester	179,342	Paid entry
14	East Lancashire Railway	Bury	170,669	Paid entry
15	Portland Basin Museum	Tameside	114,820	Free
16	Salford Museum and Art Gallery	Salford	109,794	Free
17	People's History Museum	Manchester	107,343	Free
18	Gallery Oldham	Oldham	106,695	Free
19	Breakout Manchester	Manchester	58,666	Paid entry
20	Ordsall Hall Museum and Gardens	Salford	43,958	Free
21	Touchstones Rochdale	Rochdale	35,833	Free
22	Stockport Air Raid Shelters	Stockport	29,831	Paid entry
23	BBC Tours - MediaCityUK, Salford	Salford	29,660	Paid entry
24	Smithills Hall Museum	Bolton	24,164	Free
25	Greater Manchester Police Museum & Archive	Manchester	21,546	Free
26	Museum of Transport, Greater Manchester	Manchester	19,752	Paid entry
27	Museum of Wigan Life	Wigan	17,903	Free
28	Stockport Museum	Stockport	14,527	Free
29	Oldham Local Studies and Archives	Oldham	9,625	Free
30	Elizabeth Gaskell's House	Manchester	7,055	Paid entry

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 2019

	Attraction	District	Annual Total	Admittance
1	The Lowry	Salford	863,428	Free*
2	HOME (Greater Manchester Arts Centre Ltd)	Manchester	848,033	Free*
3	Manchester Art Gallery	Manchester	750,216	Free
4	Science and Industry Museum	Manchester	556,267	Free*
5	Manchester Museum	Manchester	368,748	Free
6	Bolton Museum	Bolton	362,577	Free
7	The Whitworth	Manchester	327,871	Free
8	Runway Visitor Park Manchester Airport	Manchester	290,013	Free*
9	Imperial War Museums	Trafford	244,564	Free
10	Manchester Cathedral	Manchester	198,461	Free
11	Portland Basin Museum	Tameside	114,820	Free
12	Salford Museum and Art Gallery	Salford	109,794	Free
13	People's History Museum	Manchester	107,343	Free
14	Gallery Oldham	Oldham	106,695	Free
15	Ordsall Hall Museum and Gardens	Salford	43,958	Free
16	Touchstones Rochdale	Rochdale	35,833	Free
17	Smithills Hall Museum	Bolton	24,164	Free
18	Greater Manchester Police Museum & Archive	Manchester	21,546	Free
19	Museum of Wigan Life	Wigan	17,903	Free
20	Stockport Museum	Stockport	14,527	Free

MOST VISITED PAID ENTRY ATTRACTIONS 2019

	Attraction	District	Annual Total	Admittance
1	Dunham Massey	Trafford	340,235	Paid entry
2	Manchester United Museum & Tour Centre	Trafford	310,807	Paid entry
3	National Football Museum	Manchester	179,342	Paid entry
4	East Lancashire Railway	Bury	170,669	Paid entry
5	Breakout Manchester	Manchester	58,666	Paid entry
6	Stockport Air Raid Shelters	Stockport	29,831	Paid entry
7	BBC Tours - MediaCityUK, Salford	Salford	29,660	Paid entry
8	Museum of Transport, Greater Manchester	Manchester	19,752	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.

ACCOMMODATION PROVISION

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.	4	528
Hotel: 4 star or equiv.	53	8,538
Hotel: 3 star or equiv.	103	10,730
Hotel: 1 or 2 star or equiv.	36	2,917
Hotel: Unaccredited/tbc/unknown	6	105
Guest Accommodation (B&B, guest house, inn)	125	1,183
Self-catering units (Apartment, cottage, house)	289	445
Serviced apartments	32	1,915
Total	648	26,361

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.	3	363
Hotel: 4 star or equiv.	28	5,271
Hotel: 3 star or equiv.	16	3,052
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)	56	99
Serviced apartments	21	1,524
Total	147	11,488

Source: Accommodation Counts Master xls 16/08/2021.

Notes

- There is additional accommodation provision within hostels, camping and caravanning sites, university summer lets and Air BnB.
- There is additional provision close to Manchester city centre, just outside the Manchester border, to include 5-star accommodation at The Lowry Hotel, Salford.

NEW 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. *now Hyatt.

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

2020 saw the opening of The Niu Loom at The Irish World Heritage Centre (135 rooms), Hotel Brooklyn Manchester (189 rooms) and Hampton by Hilton Manchester Northern Quarter (221 rooms).

2021 has so far seen the opening of the Premier Inn Manchester City Centre - Princess Street (155 rooms), Travelodge Rochdale (66 rooms), Qbic Manchester* (261 rooms), StayCity Manchester Northern Quarter (224 rooms) and Doghouse Manchester by Brewdog (18 rooms). *now Yotel.

HOTELS IN THE PIPELINE - OVERVIEW

7,739 new rooms are confirmed for Greater Manchester, from new openings and property extensions, a growth of 29% on the current supply. In terms of Manchester city centre, a planned 3,490 rooms are due to come on board that would increase the current supply by 30%.

The hotel pipeline sites are shown in the pipeline map at: [Hotel Pipeline Map](#)

The remaining hotels in the pipeline that are due to open in 2021, in addition to the five quoted above under 'new openings', are: CitySuites2; Leven Manchester, MOXY by Marriott Manchester and Wilde by StayCity Three St. Peter's Square, but timescales are subject to change.

If you are an existing hotelier and it would be useful to have a reference of the larger hotels that have come on board in the last five years, or to know the sites that are working towards a planning application, or to read up on the pipeline developments referenced, please contact research@visitmanchester.com and ask for the latest copy of the 'excel version of the hotel pipeline'.

HOTELS IN THE PIPELINE - DETAILED

	Hotel & Location	Rooms
Manchester City Centre		
1	Clayton Hotel Manchester City Centre (Portland St.)	329 rooms
2	Forty Seven - Kro Hospitality Group (47 Peter St.)	47 rooms
3	Hotel Du Vin (Princess St.)	70 rooms
4	Leonardo Manchester Piccadilly (Adair St.)	275 rooms
5	Leven Manchester (40 Chorlton St.)	42 apts
6	London Road Firehouse (London Rd.)	42 rooms
7	Luma Manchester (28-30 Oldham St.)	101 rooms
8	Maldron Hotel Manchester (Charles St.)	278 rooms
9	Meininger Hotel Manchester (Great Ancoats St.)	212 rooms
10	Mollie's (St. John's)	175 rooms
11	Motel One Three St. Peter's Square	328 rooms
12	MOXY by Marriott - Manchester (Spinningfields)	164 rooms
13	Pestana CR7, Manchester (Piccadilly)	150 rooms
14	Room2 Hometel (Castlefield)	59 apts
15	Staycity Aparthotel Manchester Deansgate	300 rooms
18	Treehouse Manchester	216 rooms
19	Wilde by StayCity Manchester - Three St. Peter's Sq.	256 rooms/apts
20	(TBC) 52-58 Thomas Street, Northern Quarter	26 apts
21	(TBC) Rochdale Rd.	229 rooms
22	(TBC) St. Michael's (tower)	191 rooms
Manchester Airport		
23	Hampton by Hilton Manchester Airport - AirportCity	375 rooms
24	Hilton Garden Inn - AirportCity	254 rooms
25	Holiday Inn Manchester Airport - AirportCity	280 rooms
26	Ibis Budget Manchester Airport - AirportCity	262 rooms
27	TRIBE Manchester Airport - AirportCity	412 rooms
Other locations in Greater Manchester		
28	Bolton: (TBC) Church Wharf	80 rooms
29	Bolton: (TBC) Le Man's Crescent	87 rooms +17 apts
30	Bolton: (TBC) Hulton Hall	142 rooms
31	Manchester: Cornbrook Hub/Manchester Waters Courtyard by Marriott	155 rooms
32	Manchester: Cornbrook Hub/Manchester Waters	88 apts/rooms
33	Manchester: Holiday Inn Express Central Park Plaza	120 rooms
34	Oldham: (TBC) Rock St.	70 rooms
35	Rochdale: Hampton by Hilton Rochdale	146 rooms
36	Salford: CitySuites2	142 rooms
37	Salford: Maldron Victoria (Chapel Street/Greengate)	188 rooms
38	Trafford: Hilton Garden Inn Emirates Old Trafford (2)	109 rooms
39	Trafford: Hampton by Hilton (Lostock Circle)	147 rooms
40	Trafford: Trafford Waters	Up to 400 rooms
41	Trafford: Victoria Warehouse	Up to 775 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. 20/10/2021

FURTHER INFORMATION

GLOSSARY OF LOCATION DEFINITIONS USED IN THIS DOCUMENT

- Manchester city centre – The area indicated on the map at https://www.visitmanchester.com/dbimings/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.

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 November 2021