Hotels - UK - October 2012

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"Towards the end of August 2012, VisitScotland announced the launch of a £3 million autumn campaign (its biggest ever), targeting UK residents who had not yet taken a holiday because of the Olympics and/or the weather. This seems a particularly shrewd move, given that the economic conditions driving the staycation trend remain firmly in place and the fact that domestic holidays have been running significantly under 2011's level. This also demonstrates the advantage hotels in non-event hosting markets can have, setting themselves up as a point of difference for consumers who do not want to participate in (for example) a Royal wedding, a Jubilee or an Olympics."

– Tom Rees, Senior Travel and Tourism Analyst

In this report we answer the key questions:

- **How can hotels take advantage of parents' responsiveness to on-site facilities?**
- **Is there scope for further innovation in the budget hotel market?**
- **What can operators do to benefit from poor weather, such as 2012's 'washout' spring/summer (and possibly autumn)?**
- **How can operators benefit from the growing spread of better broadband?**
- **Is attempting to attract non-stayers to use hotel facilities worthwhile?**
- **How can hotels benefit from the ageing population's impact on their user base?**

2011 was a strong year for hotels, with the number of trips growing strongly on the back of more inbound visits, a return to growth in domestic tourism after 2010's fall, and business travel in Great Britain returning to pre-recession levels (in volume terms). 2012, however, is proving a greater challenge, with the weather dampening domestic holiday/leisure usage, and the Olympics creating an uncertain occupancy picture – although, overall, London hotels appear to have profited from the opportunity to increase prices.

This report looks at the challenges and opportunities facing the market, considering business, leisure and VFR (visiting friends and relatives) stays. It examines both full-service and budget hotels, how the recession has impacted on both sectors, and forecasts the overall market for the next five years. It considers consumer trends and the performance of the regions of the UK, who the key customers are, what they look for in a hotel, and how operators can attempt to increase custom and maximise revenue.

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