

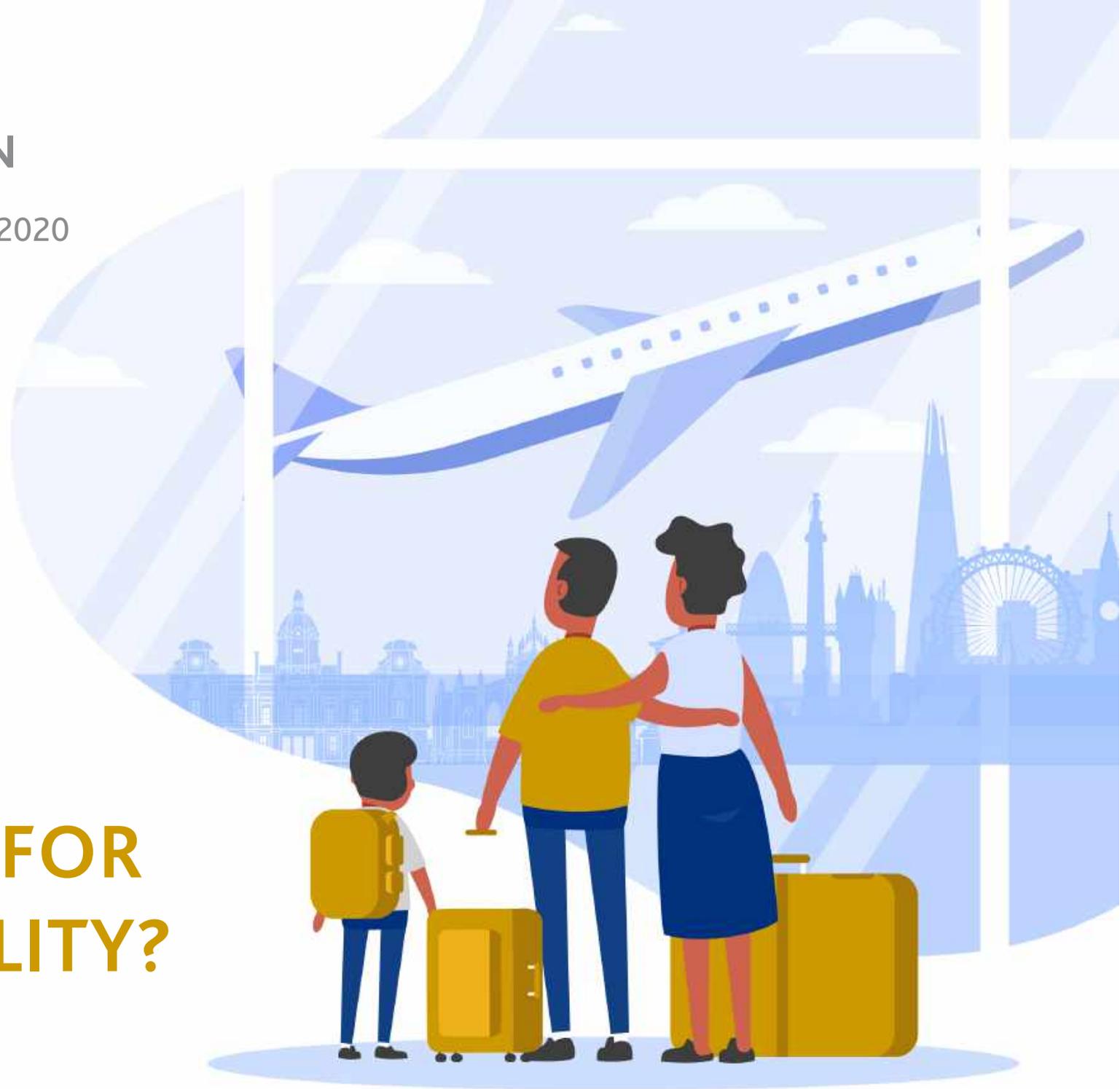


CHEVAL
COLLECTION

CHEVAL HOSPITALITY SURVEY 2020

WHAT NEXT FOR UK HOSPITALITY?

www.chevalcollection.com



INTRODUCTION

In October 2019 Cheval Collection contacted its database of guests and invited them to take part in a survey to measure business confidence and travel expectations for 2020. As we know, the hospitality landscape has changed significantly since that survey, with the spread of covid-19 resulting in an almost total cessation of international travel, and decimating hospitality businesses worldwide.

Against this backdrop, Cheval conducted a new survey to measure confidence levels in a post-covid world for business and leisure travel into the UK's top two destination cities: London and Edinburgh. All questions were caveated to gauge responses in a world where no covid-19 vaccine was available.

DEMOGRAPHICS

TOTAL RESPONDENTS: 1,876



COUNTRY OF RESIDENCE:  81%  7%  12% OTHER COUNTRIES

RESIDENT IN LONDON: 16%

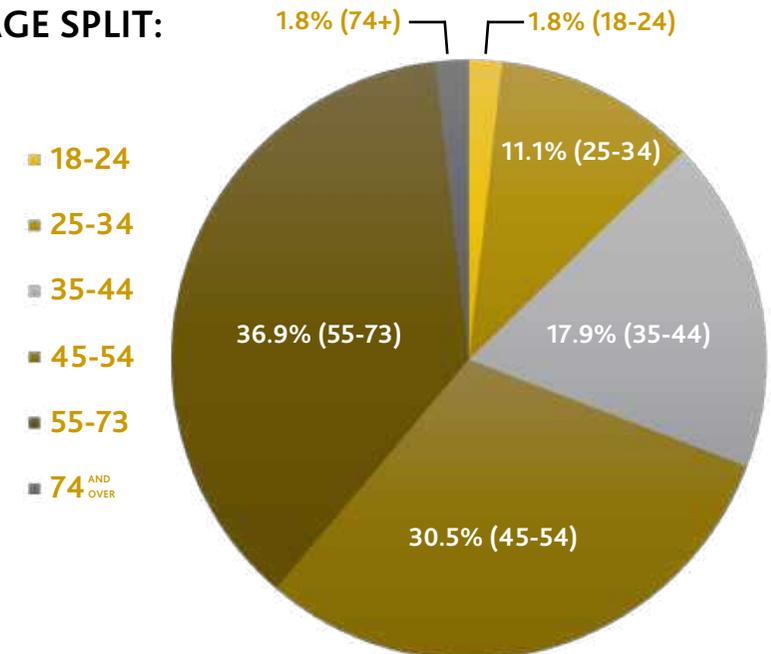
RESIDENT IN OR NEARBY EDINBURGH: 28%

RESPONDENTS

There were 1,876 respondents to the survey, representing 15.5% of those who opened the emails sent on the 17th and 20th July to Cheval's database.

Residents in the United Kingdom make up 81% of respondents, with 7% from the USA. The remaining responses come from more than 100 different countries. A breakdown of the respondents' age is illustrated below.

AGE SPLIT:



SURVEY FINDINGS | TRAVELLING BY PLANE

When questioned about their intention to travel by aeroplane, only 54% of all respondents said they would be **very** or **somewhat likely** to take a short-haul flight (travel time of less than four hours) in the near future. This percentage fell to 33% when asked the same question for long-haul flights of more than four hours' duration. Of all respondents, 80% said mandatory face coverings for passengers would make them feel more secure when travelling, with 91% expecting frequent cleaning of surfaces and touchpoints.

Over 86% would expect to be offered hand sanitiser during their journey, but fewer than half would expect flight crew or ground staff to be wearing gloves or face shields. A smaller number of respondents said they would only fly commercially if they were surrounded by empty seats, an option that was at one point trailed in the media, however no airline has put this into commercial practice.

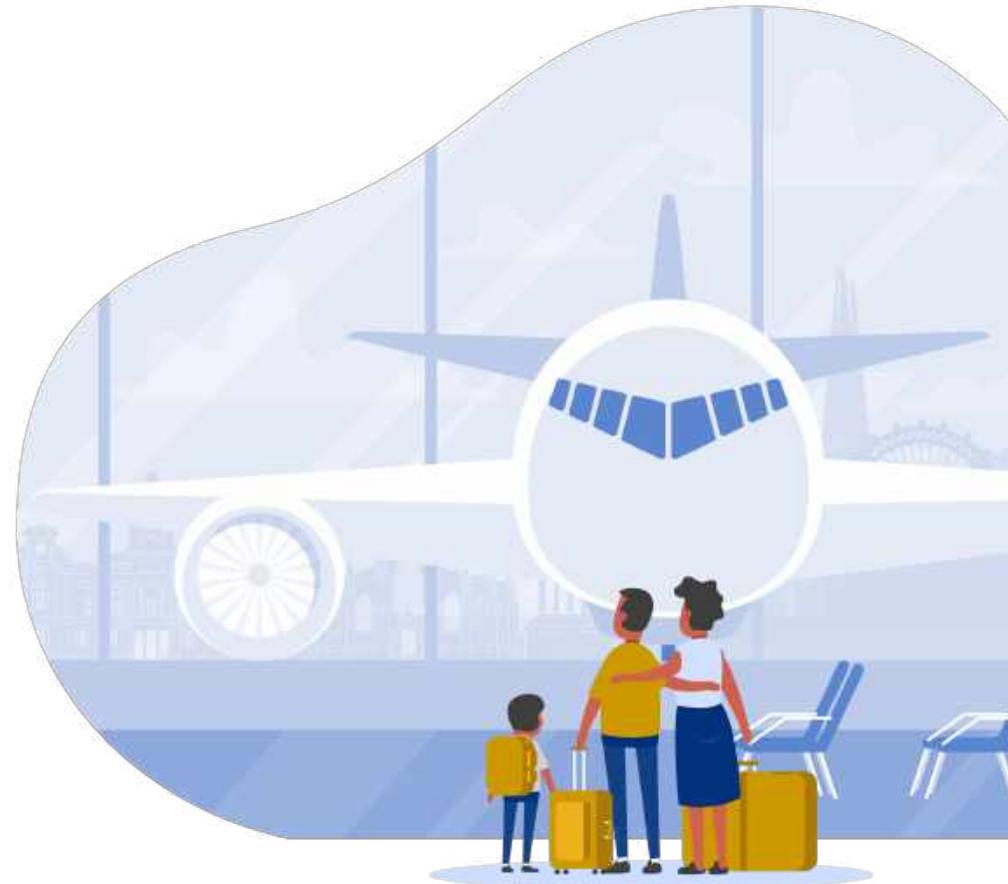
54% would be **very likely** or **somewhat likely** to take a **short haul flight (< 4 hours)**

33% would be **very likely** or **somewhat likely** to take a **long haul flight (> 4 hours)**

80% of respondents said mandatory face masks for passengers would make them feel more comfortable about flying

91% of respondents expect frequent cleaning of surfaces and touchpoints

86% of respondents expect to be offered hand sanitiser during their journey



SURVEY FINDINGS | STAYING SAFE ON ARRIVAL

When staying in accommodation, almost 95% would be reassured by more frequent cleaning of surfaces and touchpoints, with 90% expecting hand sanitiser at check-in. Around three quarters of people would be further reassured by temperature checks on arrival and clear social distancing signage in place. 74% of those who responded would be favourable to a keyless and touchless check-in process, using their phone to gain access to their apartment or room.



would be reassured by more frequent cleaning of surfaces and touchpoints



expect hand sanitiser at check-in



would be reassured by temperature checks on arrival and clear social distancing signage



would prefer a keyless and touchless check-in process, using their smartphone

DESTINATION | LONDON

Previously the unchallenged first choice destination for visitors to the United Kingdom, the likelihood that non-residents would be confident to book accommodation in London for business purposes fell to 61%, compared to 91% when asked the same question in October 2019.

The percentage of those feeling very or somewhat confident to travel to London for leisure purposes was only slightly higher at 63%. Residents of the city and its surrounding commuter belt were only marginally more likely to feel confident about visiting the city, with 67% expressing moderate or high confidence levels.

When broken down by age profile, those aged 55 or older were significantly less likely to feel confident about leisure travel to London, with only 55% saying they were very or somewhat confident to do so. Confidence levels were much higher in the 18-34 age bracket, at 73%.



WHEN TRAVELLING TO LONDON

61%

of non-residents would be **very** or **somewhat confident** to book accommodation for a **business trip**

- 52% of those aged 55 or above are very or somewhat confident
- 71% of those aged 18-34 are very or somewhat confident

63%

of non-residents would be **very** or **somewhat confident** to book accommodation for a **leisure trip**

- 55% of those aged 55 or above are very or somewhat confident
- 73% of those aged 18-34 are very or somewhat confident

67%

of London residents would be **very** or **somewhat confident** to plan a **business trip**

68%

of London residents would be **very** or **somewhat confident** to plan a **leisure trip**

54%

would consider using public transport to complete their journey

DESTINATION | LONDON

Amongst non-residents, serviced apartments were the clear winner when choosing accommodation, with 70% saying they would be very or somewhat likely to choose this option.

Sixty percent would also consider staying in a traditional hotel bedroom, however only 42% would consider a privately owned property booked via an AirBnB-style platform. There is a stark generational divide in terms of attitudes to AirBnB-style properties, with almost two-thirds of those aged 34 or younger likely to consider this method of booking accommodation, compared to only one-third of those aged 55 or above.

Around 82% of respondents have planned or are considering a leisure trip to London in the next six months, with almost three quarters expressing a desire to participate in outdoor activities during their visit. Eating out in restaurants was the second most popular activity, with 68% planning to do so, however shopping was the least popular activity surveyed, with just under half planning to hit the high street. If they do intend to visit the city, just over half would consider using public transport to do so.

WHEN BOOKING ACCOMMODATION IN LONDON

70% would be **very likely** or **somewhat likely** to book a **serviced apartment**

60% would be **very likely** or **somewhat likely** to book a **hotel**

42% would be **very likely** or **somewhat likely** to book on an **AirBnB-style platform**

- 61% of those aged 18-34 would consider this style of accommodation
- 31% of those aged 55+ would consider this style of accommodation



DURING THEIR VISIT TO LONDON

73% plan to take part in outdoor activities

68% plan to dine in restaurants

59% plan to visit iconic tourist site and paid attractions

49% plan to include a shopping excursion as part of their visit

DESTINATION | EDINBURGH

Confidence levels in travel to Edinburgh amongst non-residents are only slightly higher than those for London, at 64% and 68% for business and leisure purposes, respectively, suggesting that people perceive the two cities to present a similar level of risk. Amongst Edinburgh city and area residents, however, confidence levels in planning business and leisure trips are significantly higher, at 88% and 93%, respectively. The survey did not ask about confidence in public authorities managing the response to the pandemic, but these results indicate that Edinburgh residents are extremely confident in how this has been handled in their region.

WHEN TRAVELLING TO EDINBURGH

64% of non-residents would be **very** or **somewhat confident** to book accommodation for a **business trip**

88% of Edinburgh residents would be **very** or **somewhat confident** to plan a **business trip**

68% of non-residents would be **very** or **somewhat confident** to book accommodation for a **leisure trip**

93% of Edinburgh residents would be **very** or **somewhat confident** to plan a **leisure trip**



DESTINATION | EDINBURGH

As in London, serviced apartments were the most preferred choice when booking accommodation, with 66% of respondents considering this option, followed by 58% for hotels and only 39% for AirBnB-style platforms. These numbers were almost identical whether the purpose of the journey was for business or leisure.

Of those planning a trip to the city in the next six months, 76% would take part in outdoor activities, and 69% would visit iconic attractions. This is 10% points higher than in London. As in London, only half would consider adding shopping to their itinerary, but 73% would dine out in the city's restaurants.



WHEN BOOKING ACCOMMODATION IN EDINBURGH

- 66% would be **very likely** or **somewhat likely** to book a serviced apartment
- 58% would be **very likely** or **somewhat likely** to book a hotel
- 39% would be **very likely** or **somewhat likely** to book on an AirBnB-style platform

DURING THEIR VISIT TO EDINBURGH

- 76% plan to take part in outdoor activities
- 73% plan to dine in restaurants
- 69% plan to visit iconic tourist site and paid attractions
- 52% plan to include a shopping excursion as part of their visit



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SURVEY METHODOLOGY

Cheval sent emails to its marketing database on the 17th and 20th July 2020 inviting recipients to take part in an online survey about the future of hospitality, with questions on travel intentions for the cities of London and Edinburgh. Cheval's social media audience was also invited to participate in several online posts published in the week commencing 20th July. We received a total of 1,876 responses before the survey closed at midnight on Saturday 25th July. All those who responded were entered into a prize draw to win a free night's stay in a Cheval Residence of their choice.