



# Live Events study – Oct-20 (Wave 2)

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## Introduction & Sample

- Sodexo want to understand perceptions of attending live events since the COVID-19 pandemic, including how likely people are to visit these sites again in the future (and when), and how these results evolve over time.
- The survey was targeted to a nationally representative sample of people in four markets: the UK, USA, France and Spain.
- Analysis between this wave and the previous wave has been conducted, as well as sub-group analysis (between gender and age groups) within the current wave. **These results are shown where significant differences are seen.** Please see slide 3 for more information on these groups.

### Interview method

- 15 minute online survey using the Toluna panel
- Fieldwork for this wave: 7th-8th Oct-2020
- Fieldwork for the previous wave: 28<sup>th</sup> May – 1<sup>st</sup> June 2020



### Sample size & screening criteria

- 1000+ people per market:
  - 18+ years old
  - Have visited/ attended at least one of five specific event types: sports events, cultural venues, conferences/conventions, personal events, and/or airport/airline lounges in the past 12 months.



## Significance Testing

- Significant differences **between waves**, have been tested at the 95% confidence level. Where one wave's data scores significantly higher than the other, the below is shown:

<u>Between waves</u>				
<i>Example data:</i>	Oct-20 (A)	June-20 (B)	<b>*(A)</b>	<b>*(B)</b>
Statement 1	75%(B)	25%	Where <b>June-20 data</b> score significantly higher than Oct-20 data	Where <b>Oct-20 data</b> score significantly higher than June-20 data
Statement 2	25%	75%(A)		

- Additionally, significant differences **within waves**, between gender and age groups, have been tested at the 95% confidence level. Any segments that outperform **all others** within its group are shown as per the below key:

<u>Gender groups</u>		<u>Age groups</u>		
<b>*M</b>	<b>*F</b>	<b>*18-34s</b>	<b>*35-54s</b>	<b>*55+</b>
Where <b>Males</b> score significantly higher than Females	Where <b>Females</b> score significantly higher than Males	Where 18-34 year olds...	Where 35-54 year olds...	Where 55+ year olds...
		... score significantly higher than both other age groups		

Please note significant differences only shown where base sizes for each group are >50



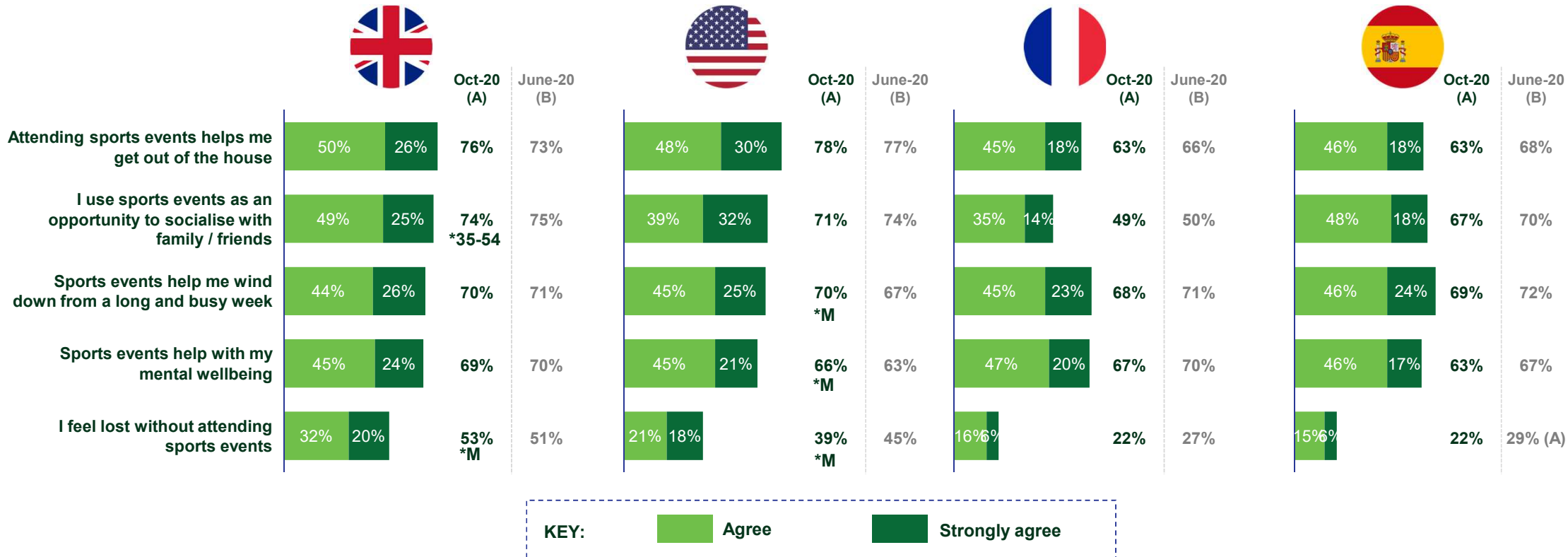
# Perception of Sports Events

# Reasons for attending



Sports events continue to provide an opportunity to get out of the house, socialise with family and friends, wind down after a long and busy week and to help with mental wellbeing. Feeling lost without attending sports events is less important, and has fallen further in the US, France and Spain.

## Drivers for attending sports events

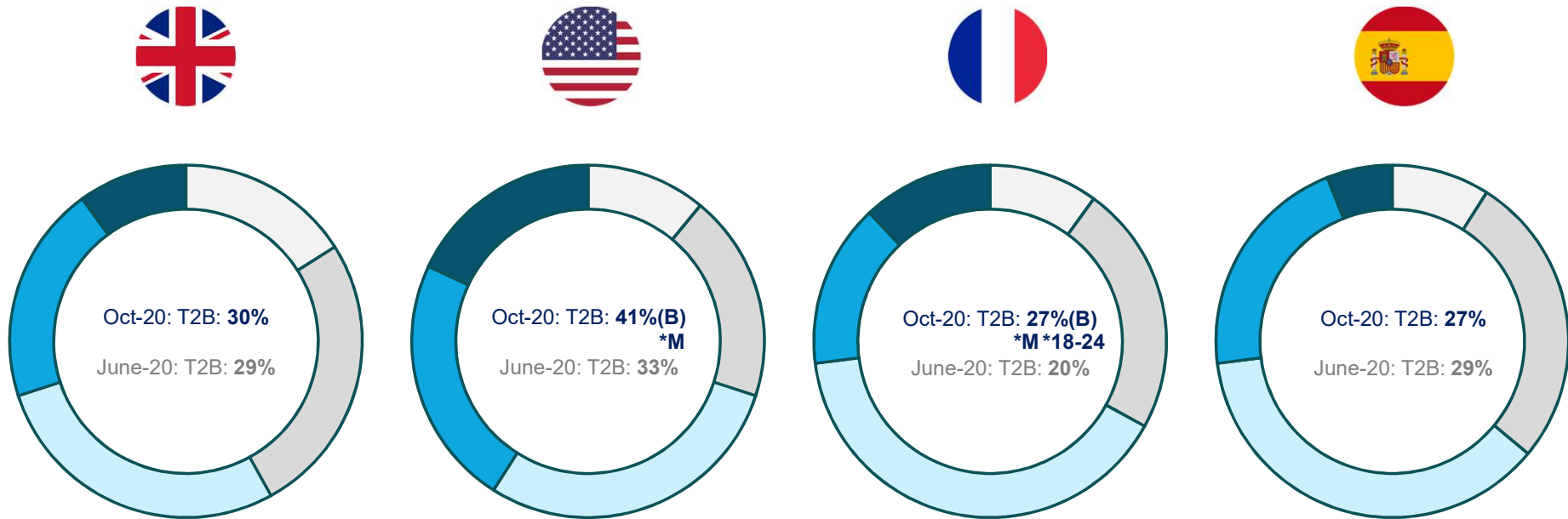


# Level of comfort in attending – T2B scores



Comfort levels in attending have increased significantly for respondents in the US (to two-fifths) and France (to almost 3 in 10). Comfort levels in the UK and Spain remain consistent.

## Level of comfort attending a sports event



**Significance key:**  
 • Oct-20 (A)  
 • June-20 (B)



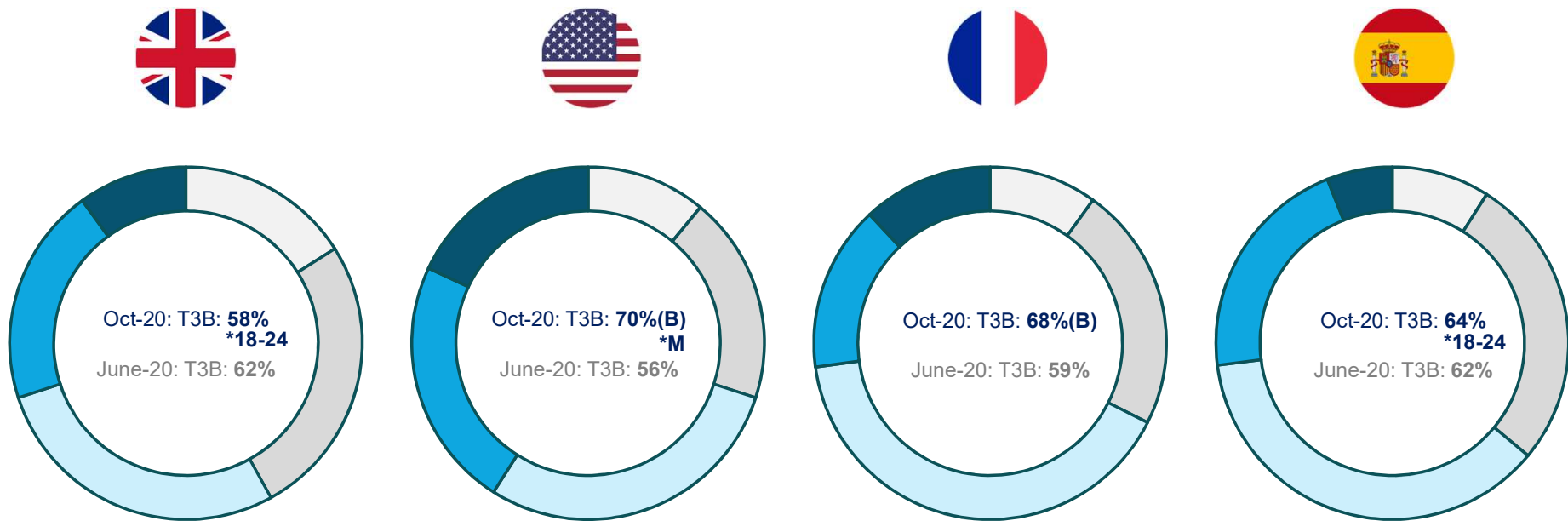
MQ2. How comfortable would you feel about booking/ attending a sports event in a stadium and/or an arena, as soon as they become available again?  
 Base: All who have attended a sports event in a stadium: Oct-20: UK (n=566), USA (n=470), FR (n=508), ES (n=449)  
 June-20: UK (n=577), USA (n=747), FR (n=582), ES (n=757)



# Level of comfort in attending – T3B scores

6 in 10 in the UK and Spain and 7 in 10 in the US and France feel at least somewhat comfortable in attending a sports event in an arena, as soon as they become available again. Scores for the US and France have improved significantly. The view in the US is a particularly telling; having previously been the least comfortable group across the four, this market now scores marginally higher than other markets.

## Level of comfort attending a sports event



**Significance key:**

- Oct-20 (A)
- June-20 (B)



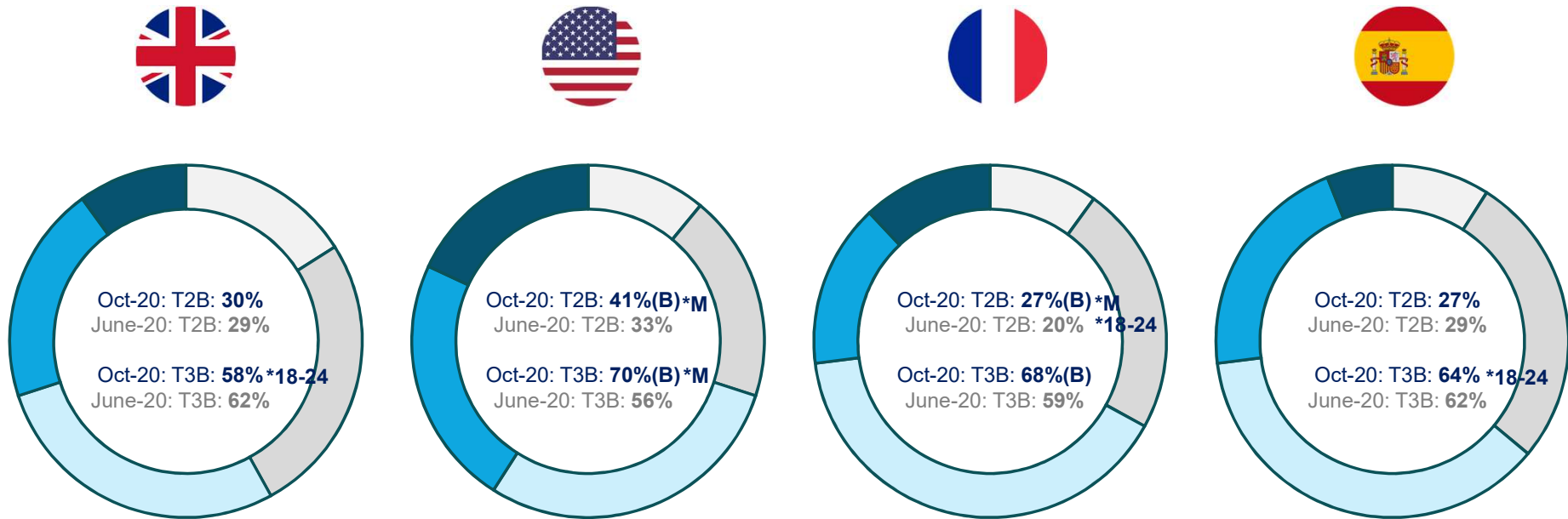
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 Base: All who have attended a sports event in a stadium: Oct-20: UK (n=566), USA (n=470), FR (n=508), ES (n=449)  
 June-20: UK (n=577), USA (n=747), FR (n=582), ES (n=757)

# Level of comfort in attending – T2B and T3B scores



When combined, T3B scores emphasise the view that people feel more comfortable in attending a sports event as soon as these venues become available again, with the exception of the UK, which has seen a decline in those being at least somewhat comfortable.

## Level of comfort attending a sports event



**Significance key:**  
 • Oct-20 (A)  
 • June-20 (B)



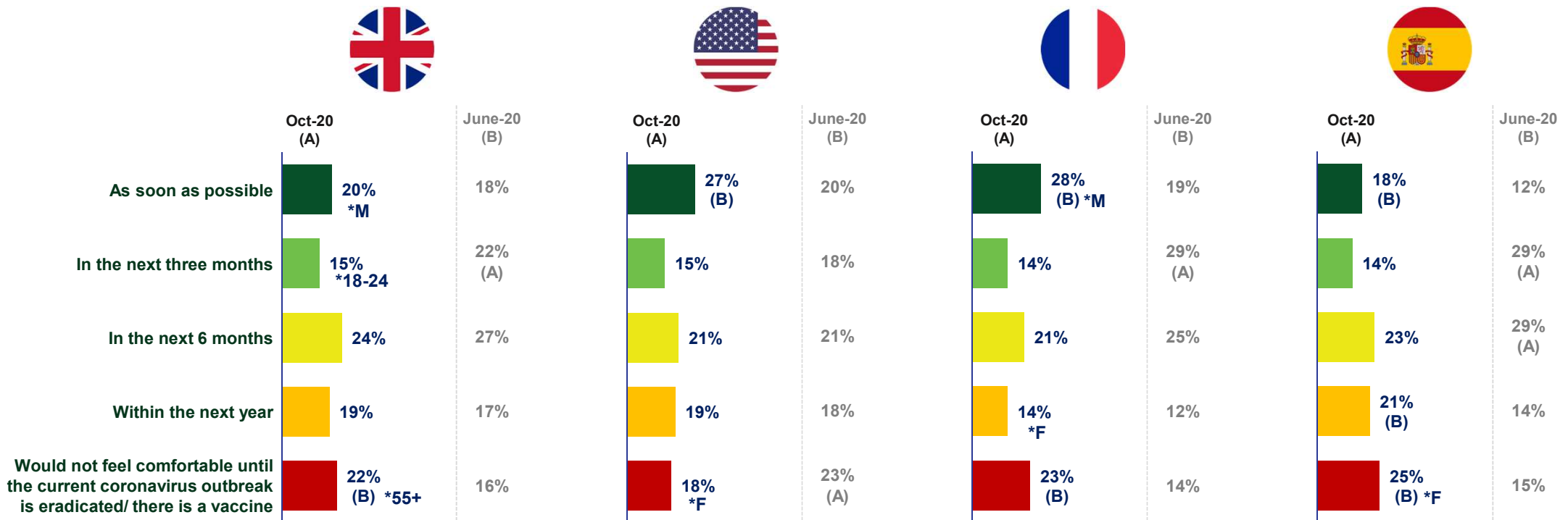


# Timeframe of when people would feel comfortable again



People in the US, France and Spain are now more likely to want to visit a sports event in a stadium as soon as possible. At the same time, though, the proportion of those reluctant to do so until there is a vaccine also has increased in the UK, France and Spain. As such, the results are more polarised than in wave 1.

## When people would attending a sports event

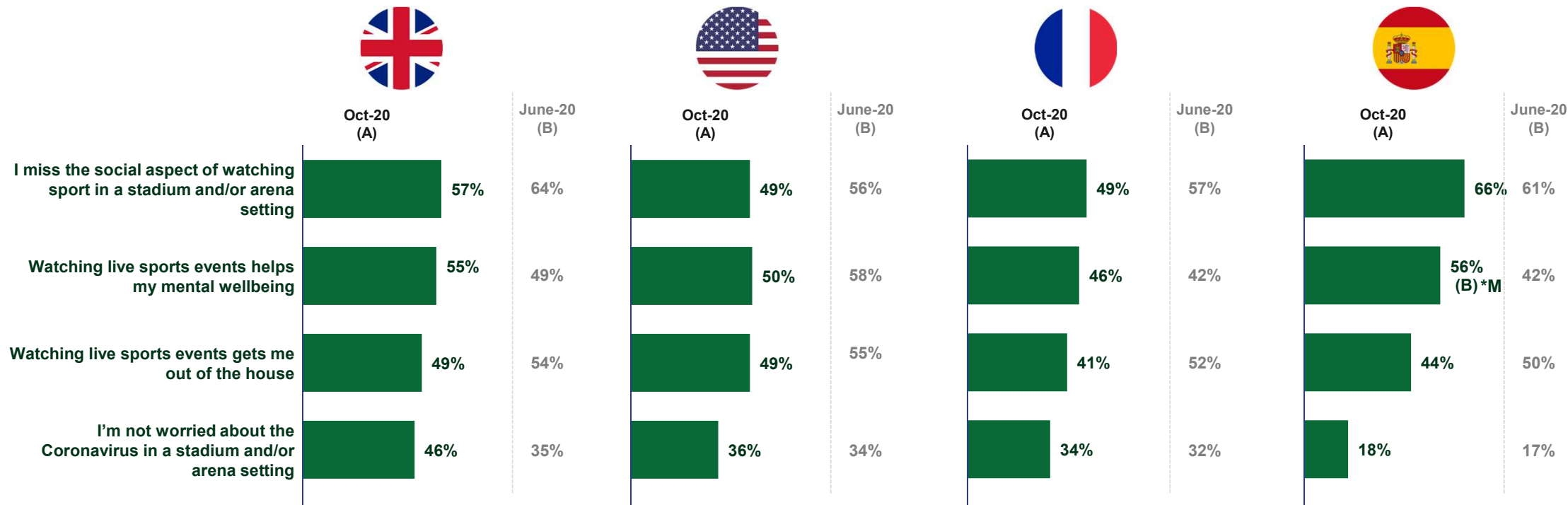


# Of those who feel comfortable enough to attend – reasons why



Of those who feel comfortable to attend, approximately half to two-thirds continue to miss the social aspect, although this has dropped in all markets except Spain since the last wave. Watching live sports to help with mental wellbeing is now of equal importance in all markets except Spain, where it has still increased in importance (in contrast to the US where it has fallen back).

## Reasons for feeling comfortable enough to attend a sports event



# How likely people are to purchase food & beverages at each location



Likelihood to purchase food and beverages in and around stadiums/ arenas is similar across all of the locations. US consumers are most likely to purchase food & beverages, followed by those in the UK and then Spain, whereas in France the majority are much less likely.

**Likelihood to purchase food & beverages at each location (new question this wave)**

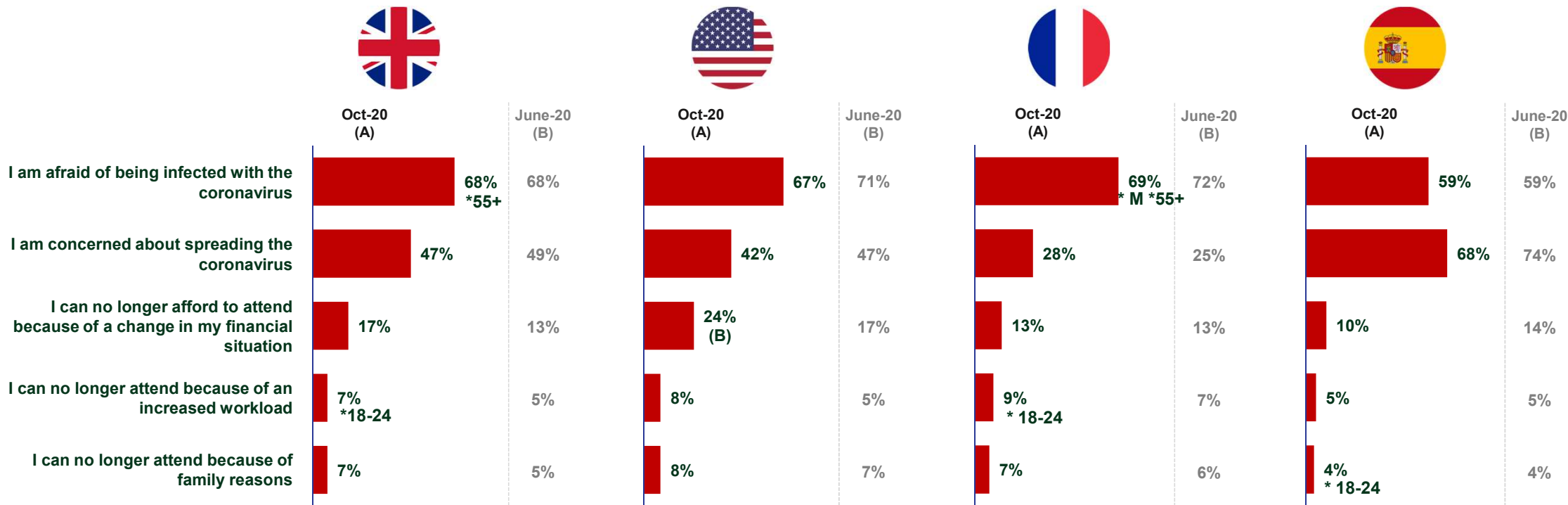


# Of those who do not feel comfortable enough to attend – reasons why



In terms of reasons people do not feel comfortable enough to attend a sports event, fear of being infected with the coronavirus continues to lead the way in the UK, US and France and there is little change in scores. People in Spain are again more concerned with spreading the coronavirus than being infected by it, but this score has seen a slight drop.

## Reasons for not feeling comfortable enough to attend a sports event



Data ranked by UK

MQ4. You've mentioned that you would not feel fully comfortable booking/ attending a sports event in a stadium and/or arena, as soon as they become available again. Which of the following factors contribute to this level of comfort?





Base: All who do not feel comfortable attending a sports event in a stadium: Oct-20: UK (n=394), USA (n=318), FR (n=370), ES (n=329)  
 June-20: UK (n=407), USA (n=504), FR (n=467), ES (n=539)

# Factors that would make people more comfortable to attend



Overall, the picture on would make people feel more comfortable is mixed across markets, but mandatory use of hand sanitizer and proper social distancing remain in the top 3 for each market, except Spain, where staff wearing masks and gloves scores slightly higher than hand sanitizer.

## Aspects that would make people more comfortable to attend a sports event

								
	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)
Mandatory use of hand sanitizer at every entrance	50%	57% (A)	50%	53%	50%	51%	58%	59%
Proper social distancing guidance (e.g. spacing between people/ groups)	50%	58% (A)	50%	55%	45% *55+	46%	62%	60%
Compulsory wearing of a mask when inside the stadium	50% *F	46%	47%	49%	57% *55+	55%	68%	66%
Staff wearing masks and gloves when handling food/ drinks	47%	53% (A)	53%	55%	44%	49%	61%	57%
No cash payments within the stadium (contactless only)	38% *55+	41%	27%	28%	25% *M	21%	28%	27%
Transparent dividers between seats	35%	42% (A)	32%	38% (A)	36%	36%	31% *F	32%
Compulsory wearing of gloves when inside the stadium	22%	34% (A)	26%	33% (A)	23%	25%	23%	30% (A)
None of these would make me feel more comfortable	13% *55+	10%	14%	13%	12%	12%	8%	7%



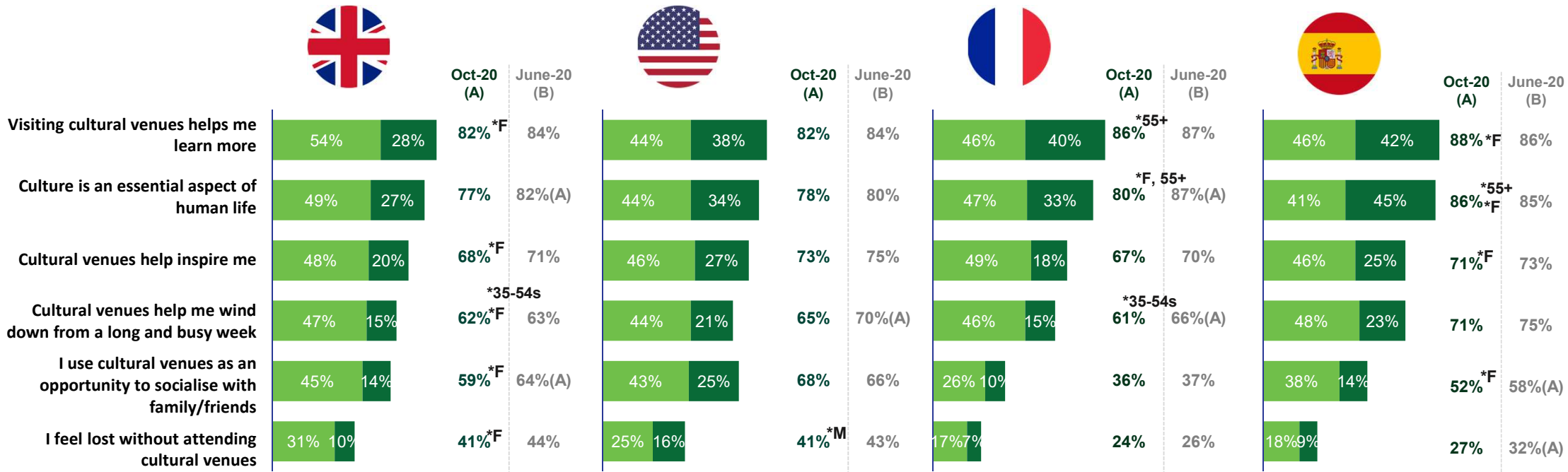
# Perception of Cultural Venues

# Reasons for visiting



For cultural venues, there is no change in attitudes, they are still primarily seen as helping people learn more and being an essential aspect of human life.

## Drivers for visiting cultural venues



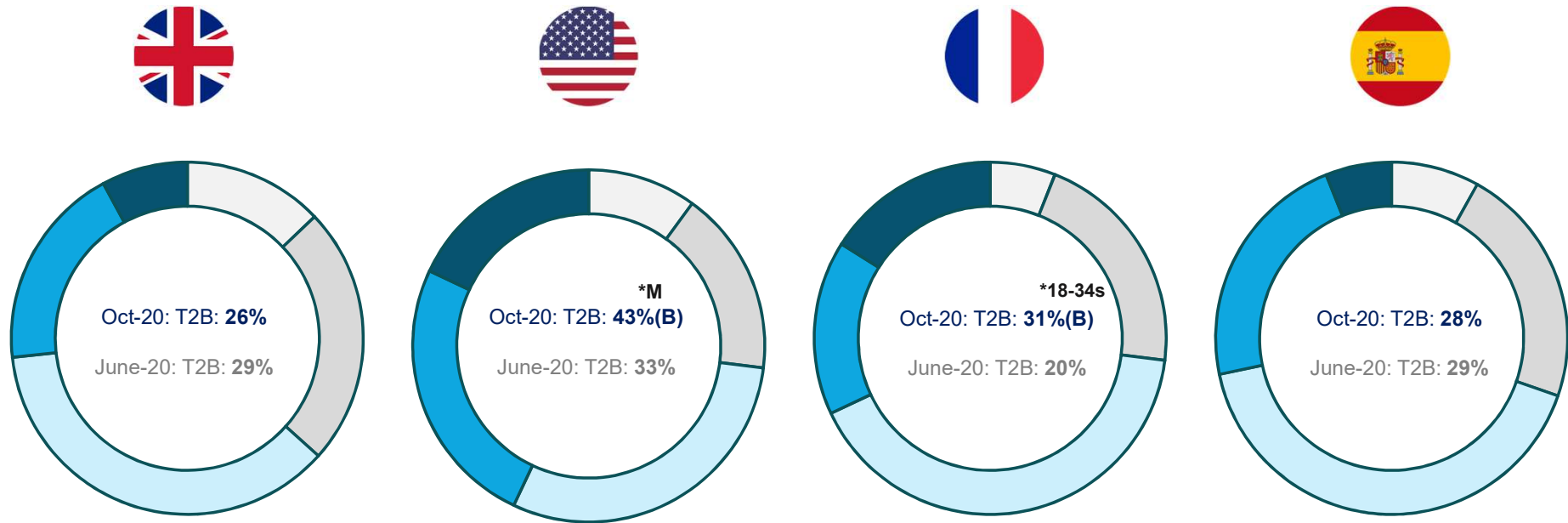
KEY:  Agree  Strongly agree

# Level of comfort in attending – T2B scores



A significant increase is seen in comfort levels in the US and France where a higher proportions are now stating they would feel very/ extremely comfortable in visiting these venues again (driven by males in the US and 18-34s in France). The UK and France show no change.

## Level of comfort when visiting a cultural venue



**Significance key:**  
 • Oct-20 (A)  
 • June-20 (B)



MQ9. How comfortable would you feel about visiting a cultural venue (e.g. museums, tourist attractions, galleries, zoos, aquariums), as soon as they open again?

Base: All who have visited a cultural venue: Oct-20: UK (n= 851), USA (n=559), FR (n=793), ES (n=799)

June-20: UK (n=879), USA (n=842), FR (n=918), ES (n=999)

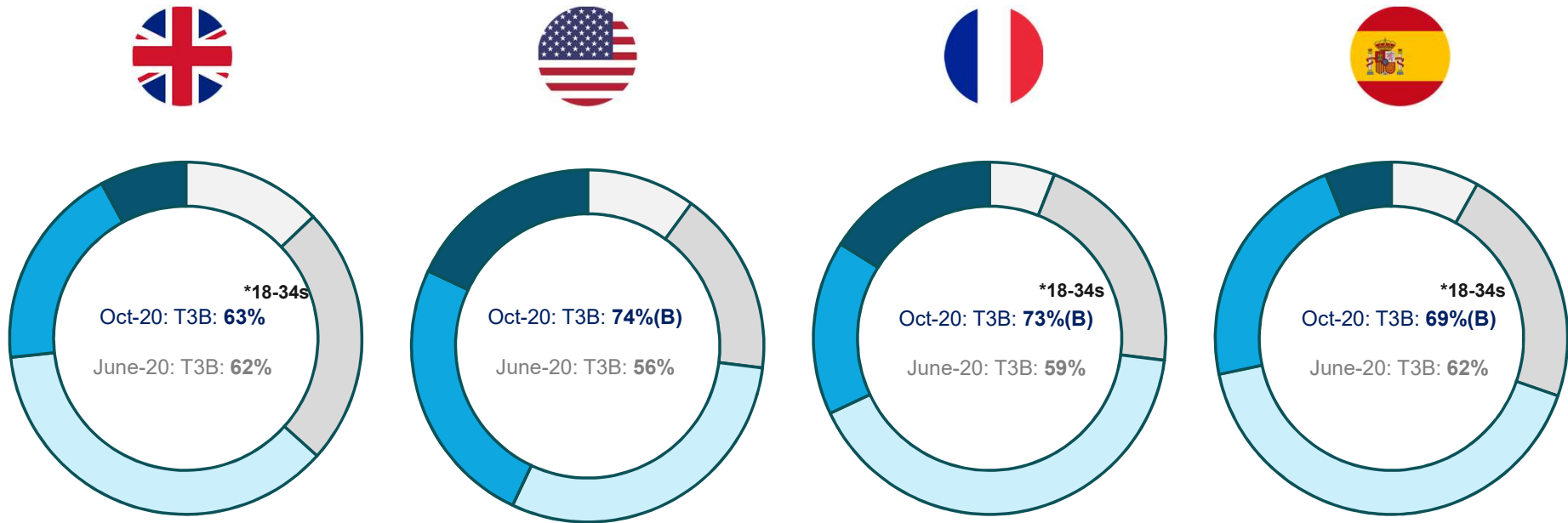


# Level of comfort in attending – T3B scores



Comfort levels are now significantly higher for the US, France and Spain where about 1 in 7 people are at least somewhat comfortable in visiting cultural venues as soon as they open again.

## Level of comfort when visiting a cultural venue



**Significance key:**

- Oct-20 (A)
- June-20 (B)

**KEY:**

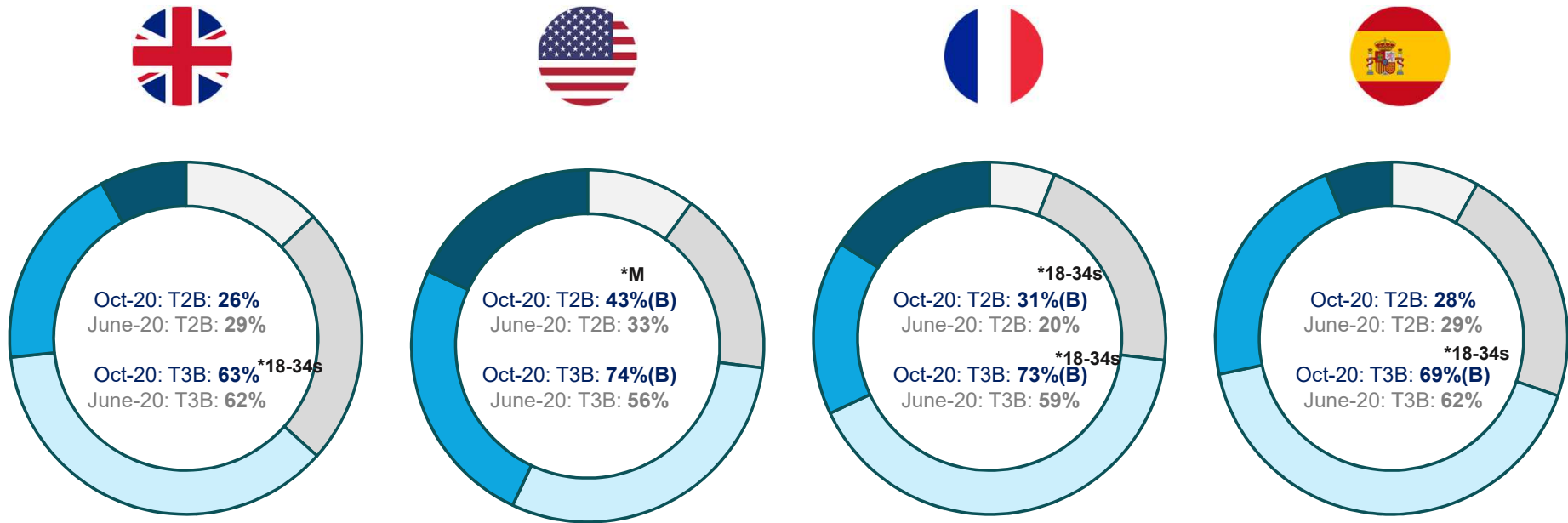


# Level of comfort in attending – T2B and T3B scores



The improvement in comfort levels can be seen clearly across T2B and T3B scores in the US and France.

## Level of comfort when visiting a cultural venue



**Significance key:**

- Oct-20 (A)
- June-20 (B)

**KEY:**



MQ9. How comfortable would you feel about visiting a cultural venue (e.g. museums, tourist attractions, galleries, zoos, aquariums), as soon as they open again?

Base: All who have visited a cultural venue: UK (n= 851), USA (n=559), FR (n=793), ES (n=799)

June-20: UK (n=879), USA (n=842), FR (n=918), ES (n=999)

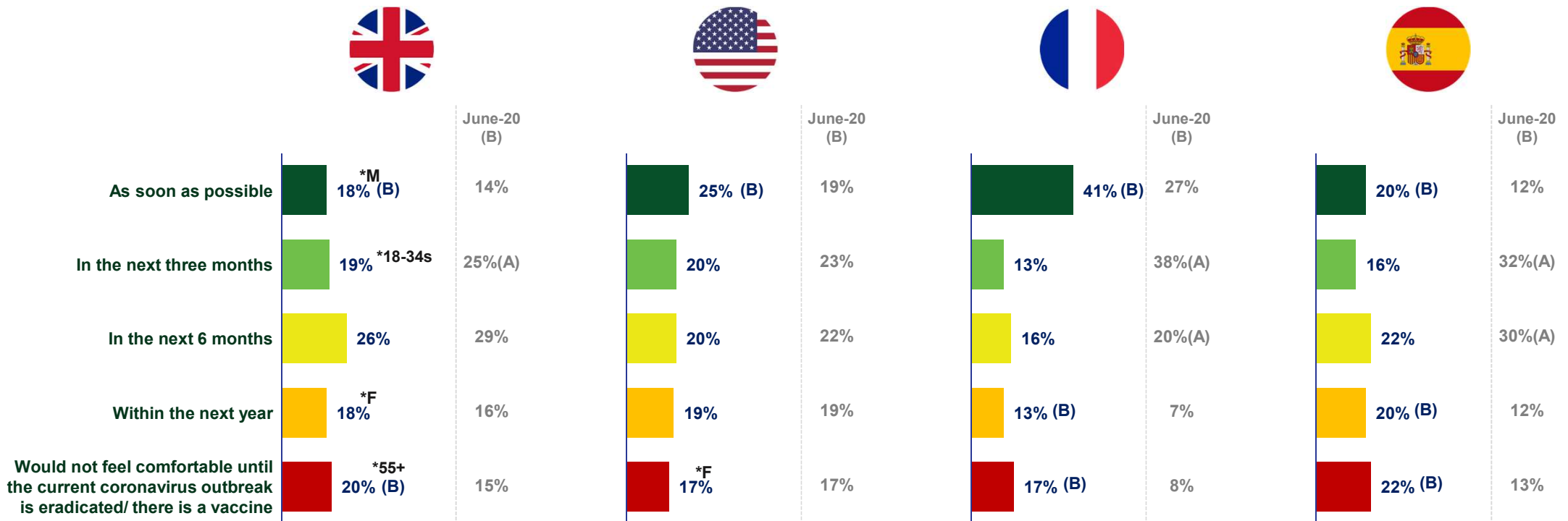
# Timeframe of when people would feel comfortable again



There is a significant increase in a proportion of people who would feel comfortable visiting a cultural venue again as soon as possible, especially in France, followed by Spain, the US and then the UK.

A higher proportion of Spanish, French and British people have a slightly different view, with significant increases seen in visiting these venues within the next year or until the current coronavirus outbreak is eradicated.

## When people would visit a cultural venue

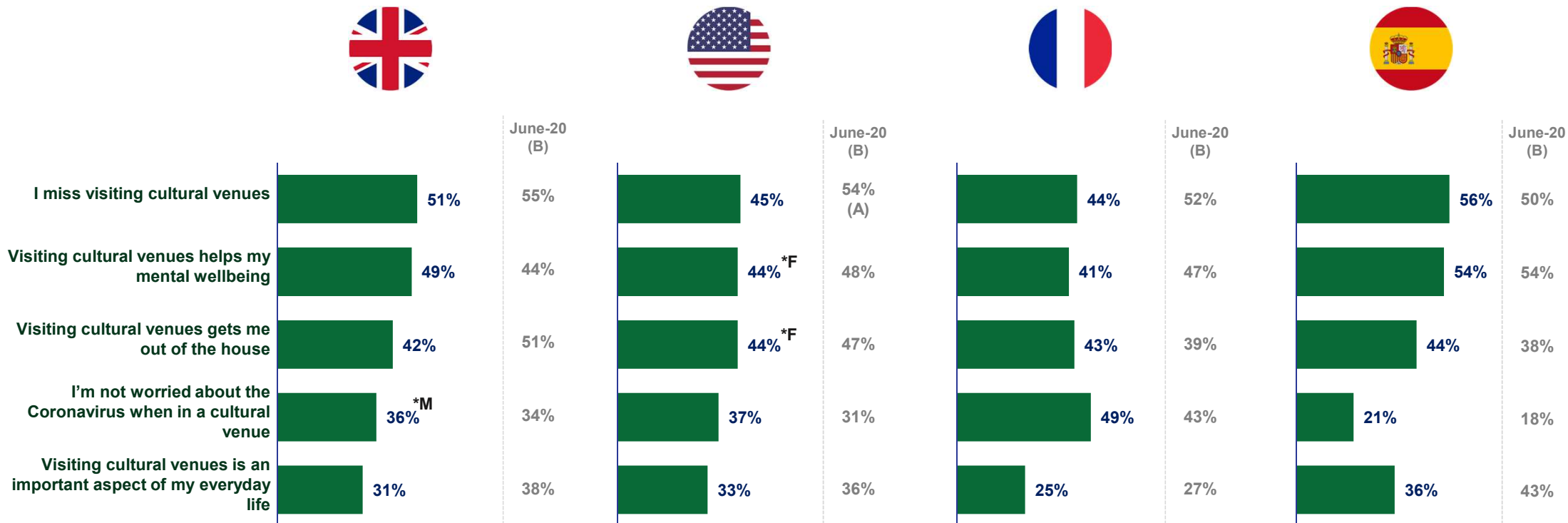


# Of those who feel comfortable enough to attend – reasons why



For people who would feel comfortable enough to visit a cultural venue again, scores remain relatively consistent. Around half state they miss them.

## Reasons for feeling comfortable enough to visit a cultural venue



Data ranked by UK

MQ10. You've mentioned that you would feel comfortable visiting a cultural venue (e.g. museums, tourist attractions, galleries, zoos, aquariums), as soon as they open again. Which of the following reasons best describe why you feel this way?

Base: All who feel comfortable visiting a cultural venue: Oct-20: UK (n=224), USA (n=241), FR (n=248), ES (n=226)

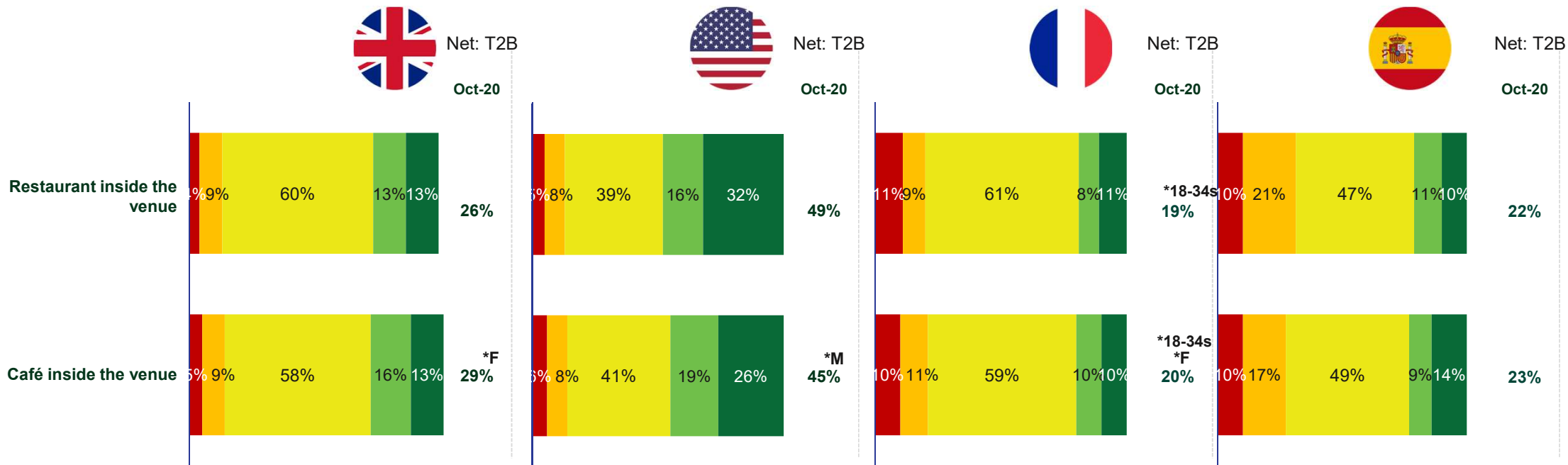
June-20: UK (n=216), USA (n=278), FR (n=229), ES (n=296)

# How likely people are to purchase food & beverages at each location



Around half of the US people would be likely to purchase food & beverages at each of the locations inside a cultural venue – the highest scoring group overall. They are followed by the UK and then Spain, with France scoring lowest across the four countries.

**Likelihood to purchase food & beverages at each location (new question this wave)**

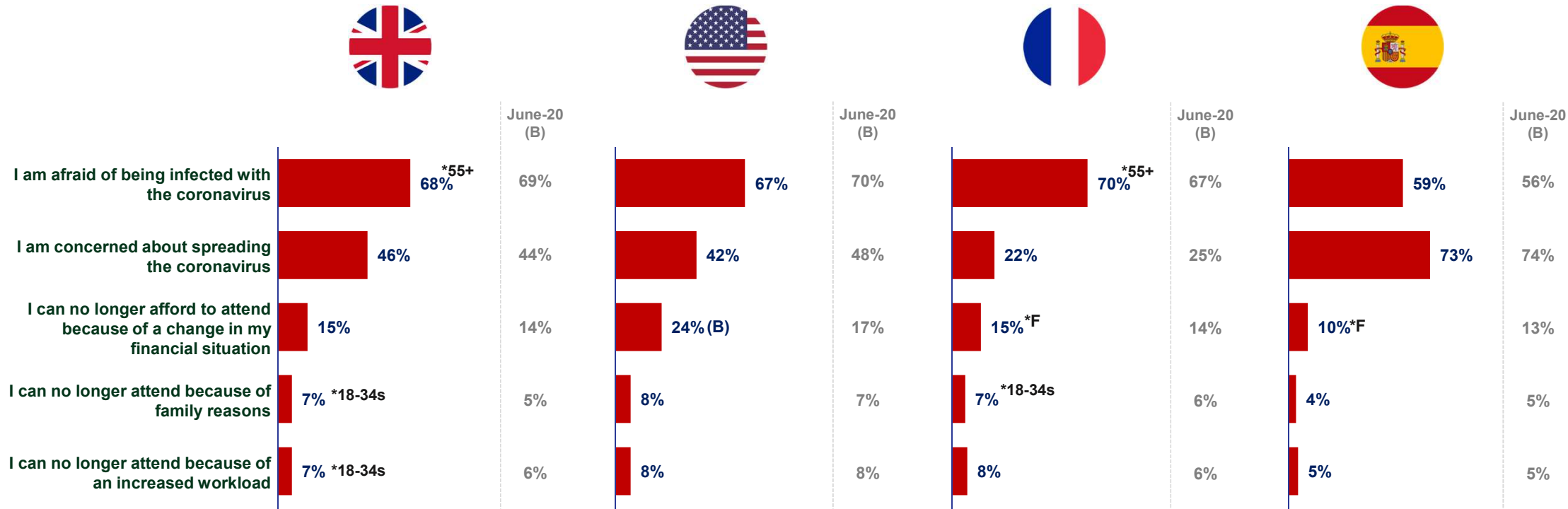


# Of those who do not feel comfortable enough to attend – reasons why



A lack of comfort with attending continues to be because of a risk of being infected across all markets (driven by those over 55s in the UK and France) with Spanish people being massively concerned about spreading the virus as well.

## Reasons for not feeling comfortable enough to visit a cultural venue



Data ranked by UK

MQ11. You've mentioned that you would not feel fully comfortable visiting a cultural venue (e.g. museums, tourist attractions, galleries, zoos, aquariums), as soon as they open again. Which of the following factors contribute to this level of comfort?

Base: All who do not feel comfortable visiting a cultural venue: Oct-20: UK (n=626), USA (n=318), FR (n=544), ES (n=573)

June-20: UK (n=663), USA (n=564), FR (n=689), ES (n=703)





# Factors that would make people more comfortable to visit



Overall, all countries would like mandatory use of hand sanitizers at every entrance to cultural venues, along with a number of other aspects: proper social distancing guidance, staff wearing masks and gloves, and compulsory wearing of masks inside the venue. However, many of these scores have seen a decrease since last wave with an exception for Spain.

In the US, there is an increase in compulsory use of gloves.

## Aspects that would make people more comfortable to visit a cultural venue

								
	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)
Mandatory use of hand sanitizer at every entrance	58% <sup>*F</sup>	61%	51%	56%	56%	59%	64%	65%
Compulsory wearing of a mask when inside the venue	56%(B) <sup>*F</sup>	42%	27%	53%(A)	67%	64%	69%	67%
Proper social distancing guidance (e.g. spacing between people/ groups)	56% <sup>*F</sup>	67%(A)	51% <sup>*F</sup>	61%(A)	52%	54%	63%	61%
Staff wearing masks and gloves	55%(B)	50%	52%	59%(A)	41% <sup>*55+</sup>	47%(A)	62%	63%
No cash payments within the venue (contactless only)	39%	41%	25%	30%(A)	24% <sup>*M</sup>	21%	29%	30%
Transparent dividers between sections / where applicable to venue	38% <sup>*F</sup>	41%	27%	38%(A)	25%	24%	36%	33%
Compulsory wearing of gloves when inside venue	24%	33%(A)	47% <sup>*M</sup>	33%	23%	21%	21%	35%(A)
None of these would make me feel more comfortable	14% <sup>*55+</sup>	10%	14%(B)	10%	12%	9%	10%(B)	6%

Data ranked by UK

MQ12. Which of the following factors would make you feel more comfortable when visiting a cultural venue (e.g. museums, tourist attractions, galleries, zoos, aquariums) again? Please select all that apply.

Base: All who have visited a cultural venue: Oct-20: UK (n=851), USA (n=559), FR (n=793), ES (n=799)  
June-20: UK (n=879), USA (n=842), FR (n=918), ES (n=999)



# Perception of Conventions/ Conferences

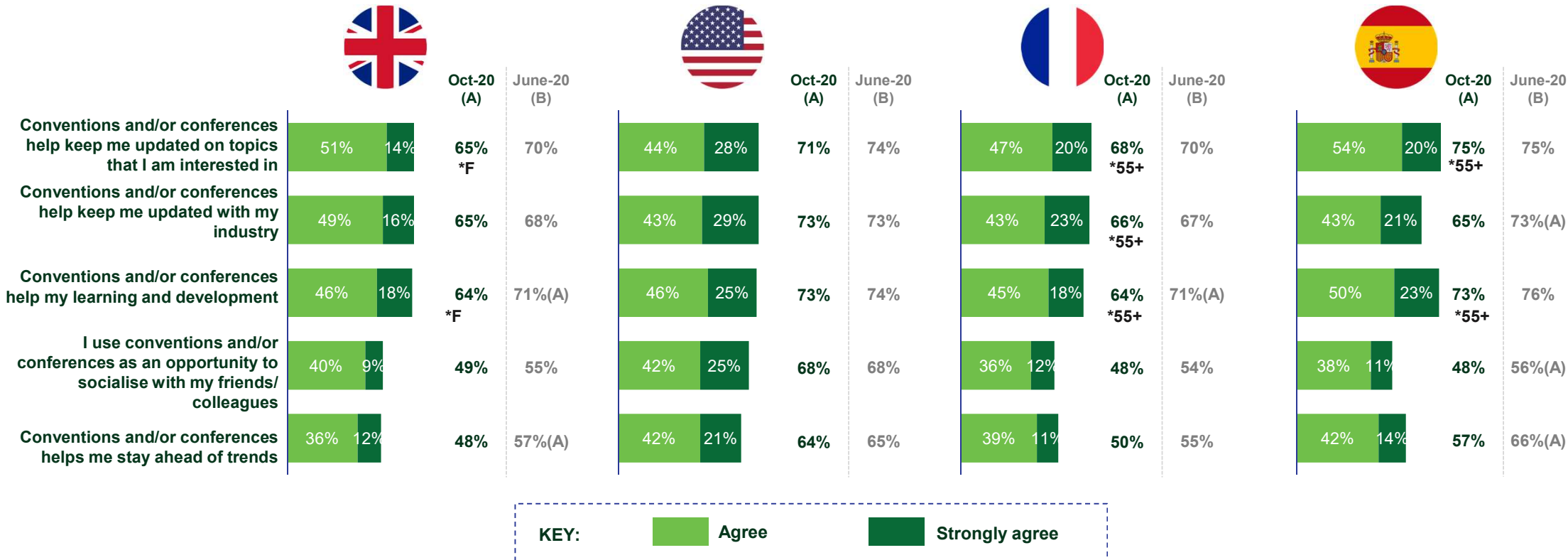


# Reasons for attending



Conferences are still seen as a great way to help learning and development, keep people up-to-date with the topics people are interested in, and as a way to keep updated with their industry. Social factor and staying ahead of trends saw a decrease in Spain and the UK.

## Drivers for attending conventions/ conferences

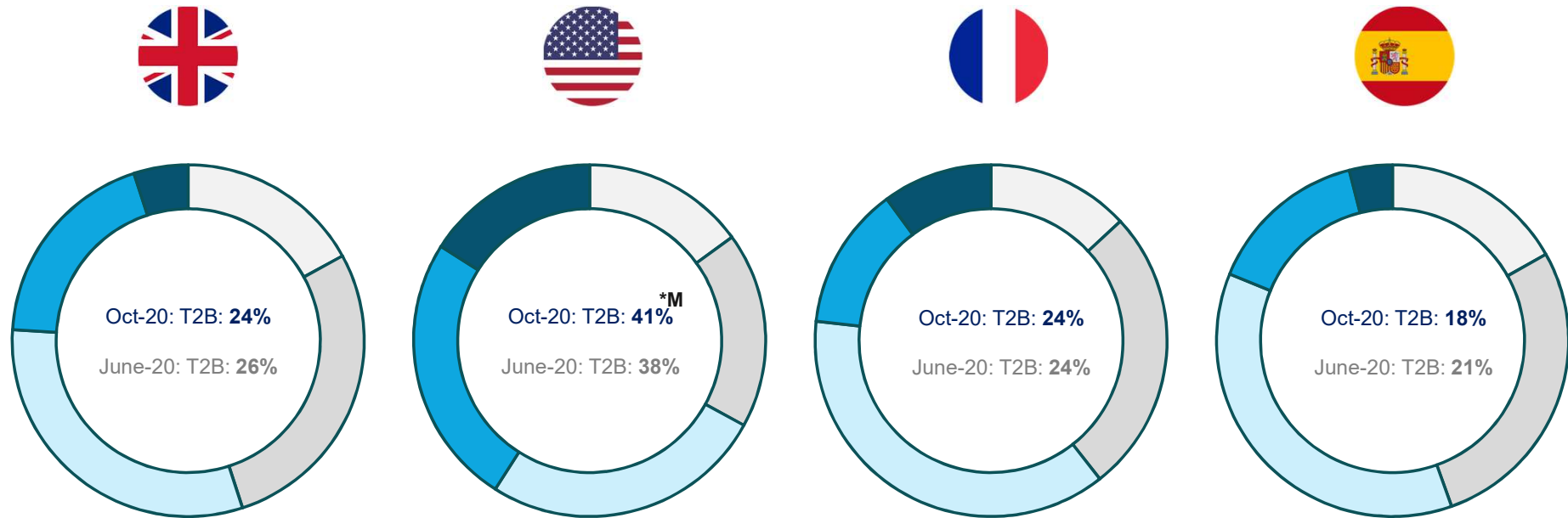


# Level of comfort in attending – T2B score



Comfort levels continue to be driven by those in the US and males, although there is no increase in proportions of those who would be very/extremely comfortable attending a conference as soon as these venues opened again.

## Level of comfort with attending a convention/ conference



**Significance key:**  
 • Oct-20 (A)  
 • June-20 (B)



MQ16. How comfortable would you feel about visiting a convention and/or conference in a hall or similar venue, as soon as they open again?

Base: All who have attended a convention/ conference: Oct-20: Oct-20: UK (n=474), USA (n= 391), FR (n= 357), ES (n= 353)

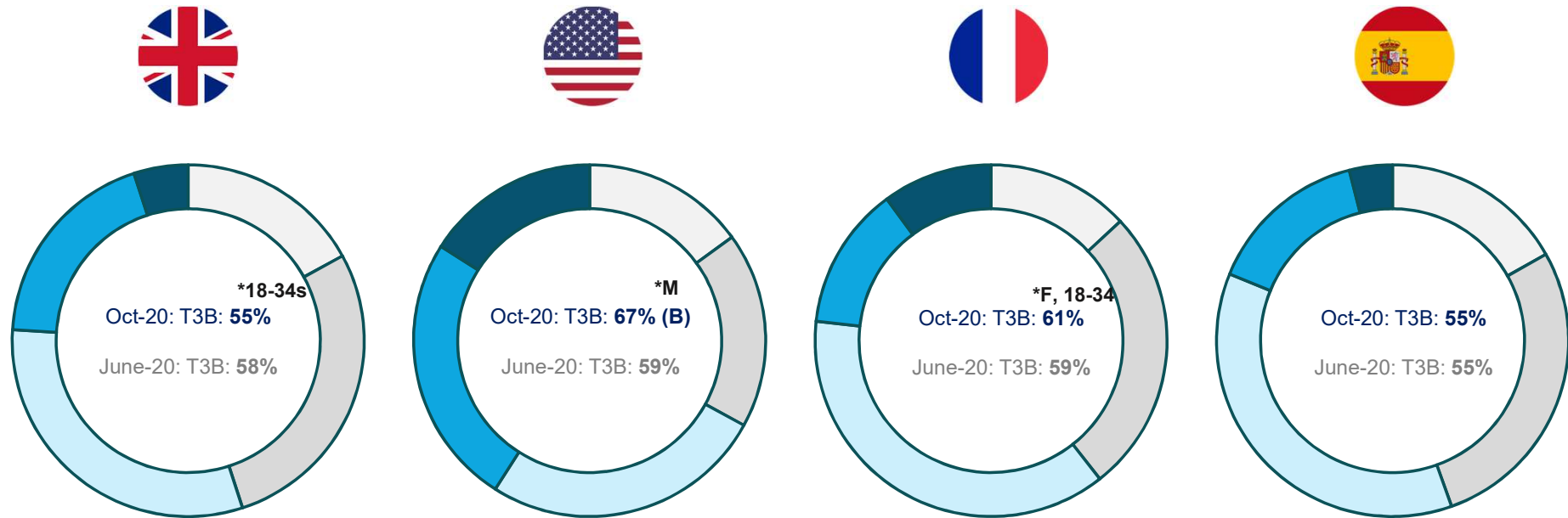
June-20: UK (n=480), USA (n=541), FR (n=478), ES (n=592)

# Level of comfort in attending – T3B score

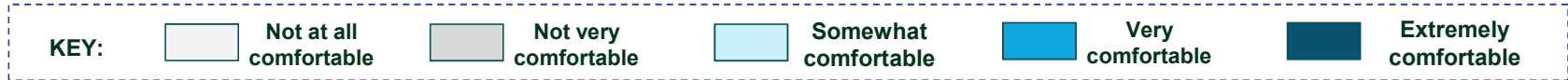


Scores including somewhat comfortable see a similar trend as in wave 1, with those from the US seeing a significant increase in comfort levels.

## Level of comfort with attending a convention/ conference



**Significance key:**  
 • Oct-20 (A)  
 • June-20 (B)



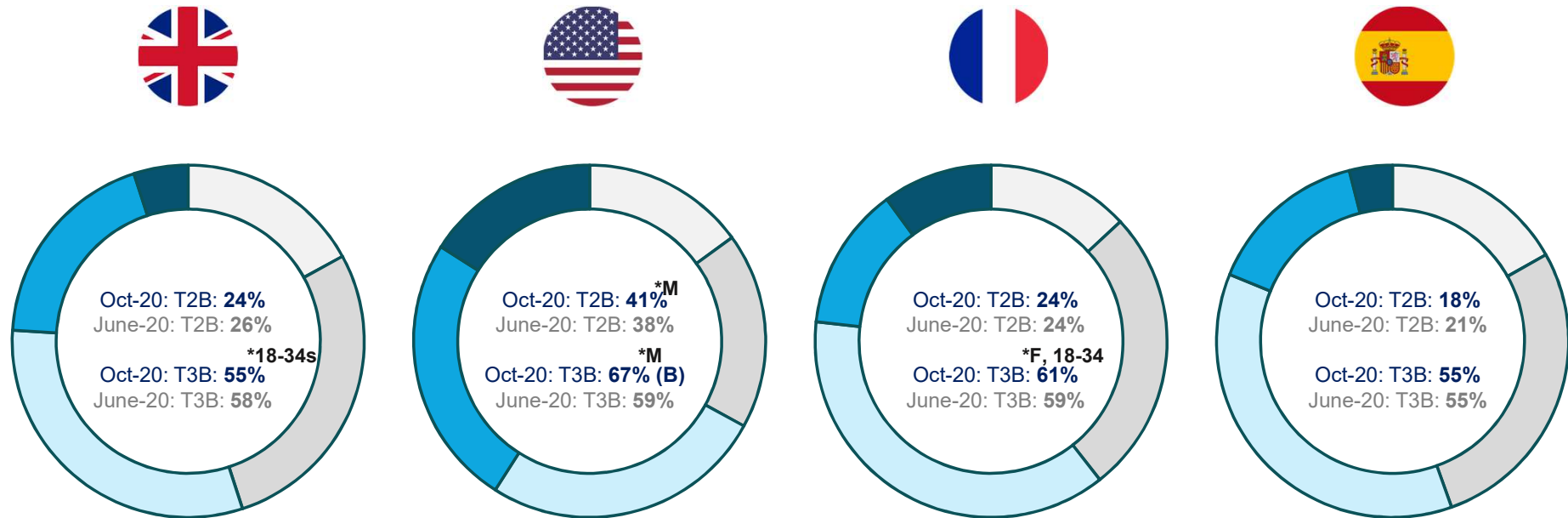
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 Base: All who have attended a convention/ conference: Oct-20: UK (n=474), USA (n= 391), FR (n= 357), ES (n= 353)  
 June-20: UK (n=480), USA (n=541), FR (n=478), ES (n=592)

# Level of comfort in attending – T2B and T3B score



When viewed directly, the contrast between those in the US and all other markets becomes clearer. US people are far and ahead the most comfortable overall in attending these events, driven by males.

## Level of comfort with attending a convention/ conference



**Significance key:**

- Oct-20 (A)
- June-20 (B)

KEY:

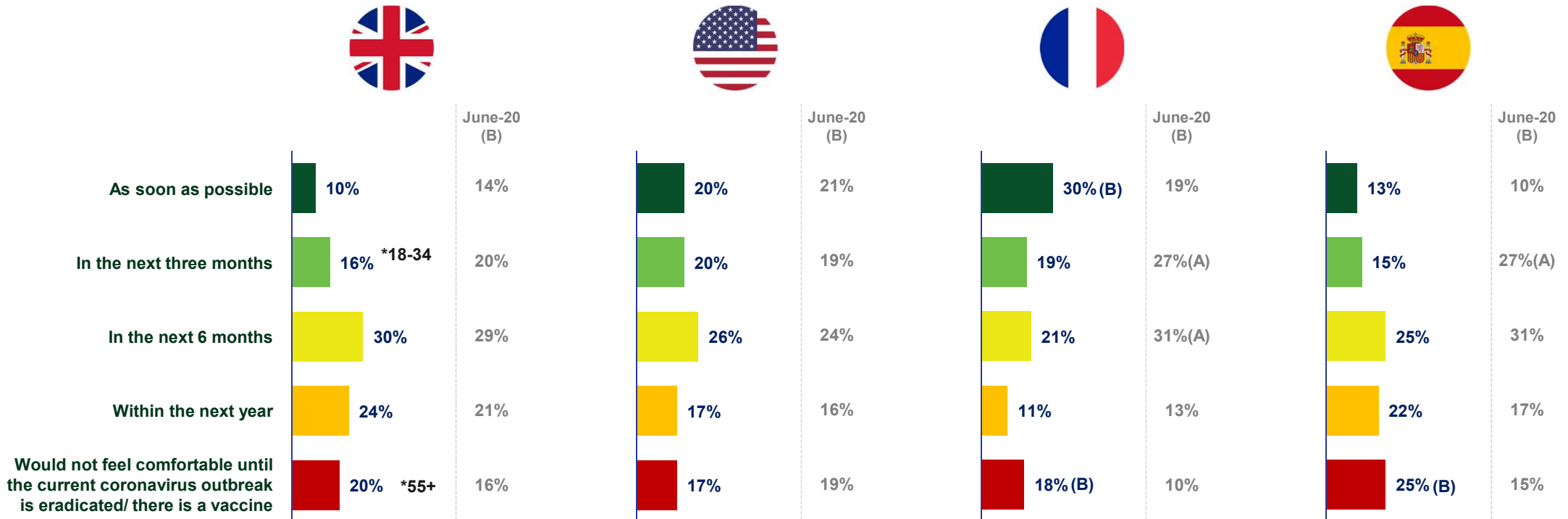


# Timeframe of when people would feel comfortable again



Those in France see a significant increase in their comfort in attending a convention/ conference as soon as possible. French and Spanish people see a significant increase in not feeling comfortable to attend until there is a vaccine, versus last wave.

## When people would attend a convention/ conference

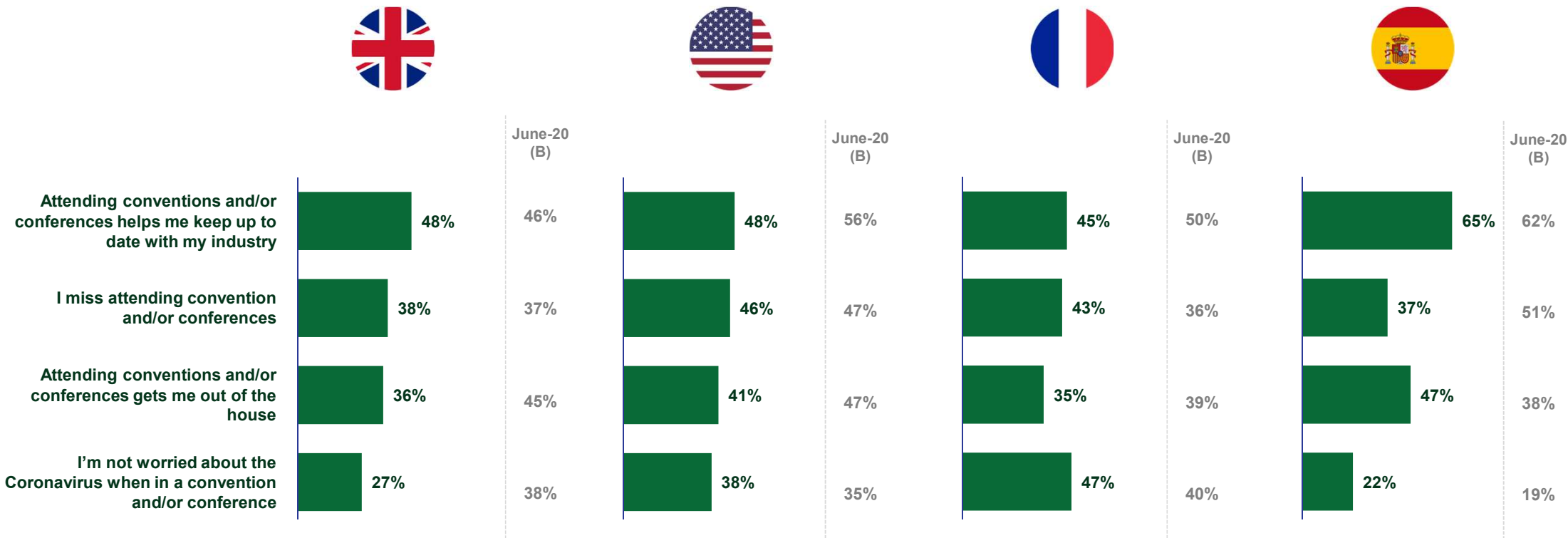


# Of those who feel comfortable enough to attend – reasons why



Reasons for feeling comfortable enough to attend conferences remain relatively consistent with last wave – Spanish people are the most likely to claim that they want to keep up to date with their industry. Those in the US and France miss conferences the most. French people, followed by the US are most likely to state that they are not worried about contracting the virus.

## Reasons for feeling comfortable enough to attend a convention/ conference



Data ranked by UK

MQ17. You've mentioned that you would feel comfortable attending a convention and/or conferences in a hall or similar venue, as soon as they open again. Which of the following reasons best describe why you feel this way?

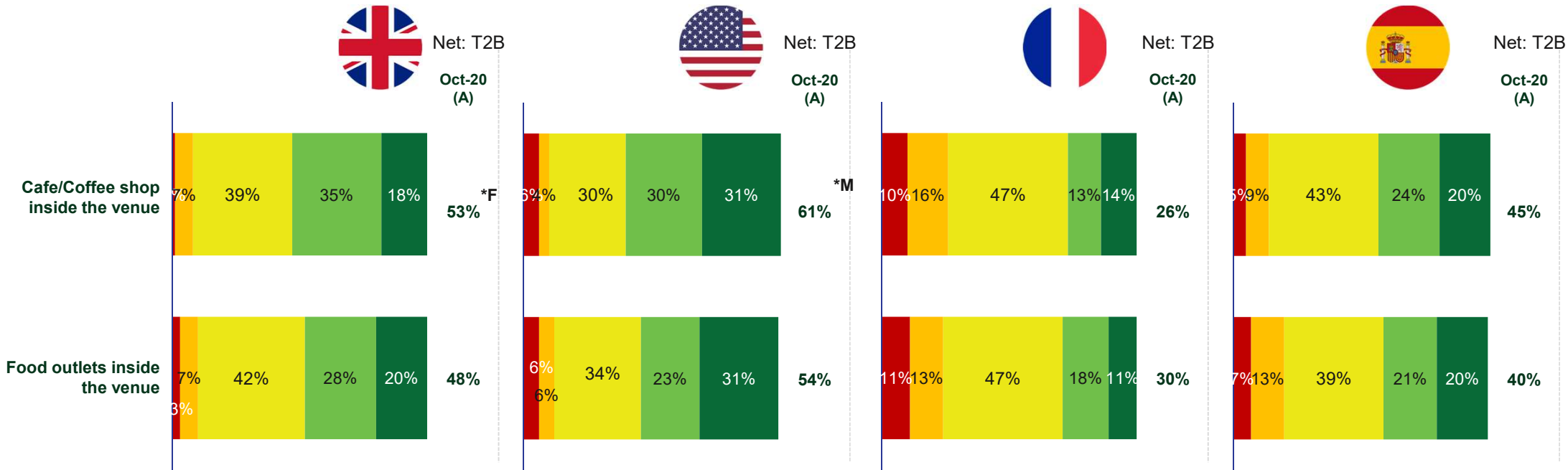
Base: All who feel comfortable attending a convention/ conference: Oct-20: UK (n= 114), USA (n= 160), FR (n= 84), ES (n=65)  
 June-20: UK (n= 126), USA (n= 201), FR (n= 114), ES (n= 126)

# How likely people are to purchase food & beverages at each location



People who are likely to purchase food and beverages inside these venues don't have a preference for where they shop. Those in the US drive likelihood to purchase food and beverages at each location, followed by those in the UK and then Spain.

## Likelihood to purchase food & beverages at each location *(new question this wave)*

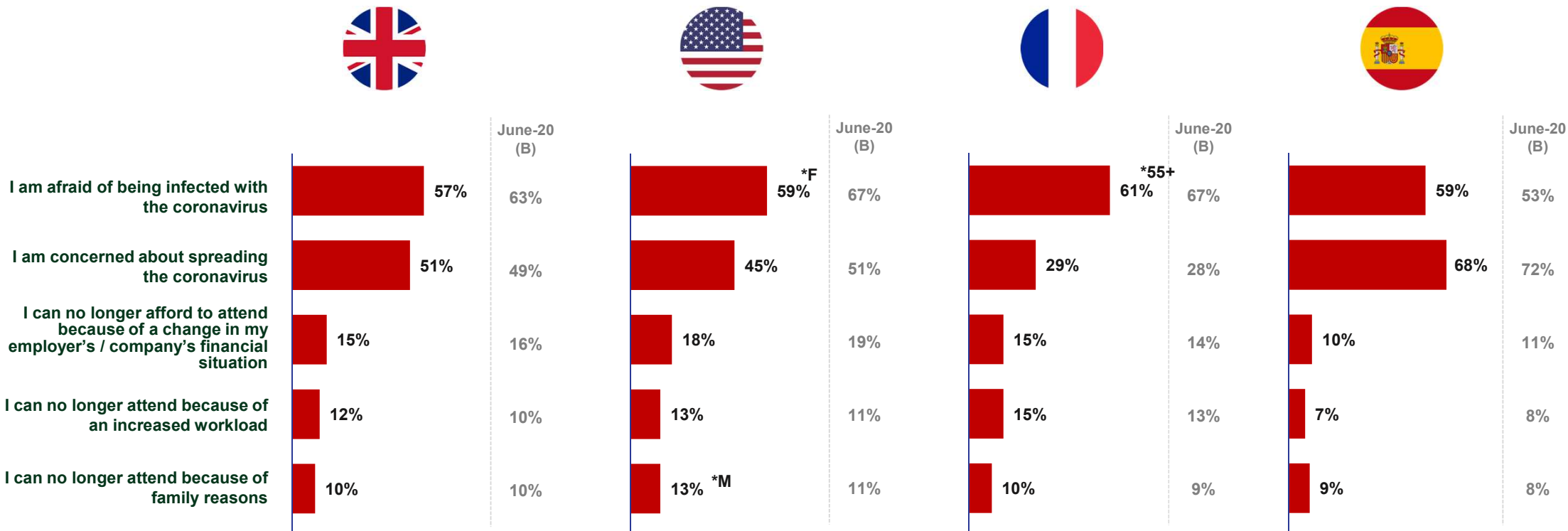


# Of those who do not feel comfortable enough to attend – reasons why



Over half are still afraid of being infected by the coronavirus. Those in Spain continue to be the most likely group to have concerns about spreading the coronavirus.

## Reasons for not feeling comfortable enough to attend a convention/ conference



Data ranked by UK

MQ18. You've mentioned that you would not feel fully comfortable attending conventions and/or conferences, as soon as they open again. Which of the following factors contribute to this level of comfort?

Base: All who do not feel comfortable attending a convention/ conference: Oct-20: UK (n= 360), USA (n= 231), FR (n= 273), ES (n= 288)  
 June-20: UK (n= 354), USA (n= 340), FR (n= 364), ES (n= 466)







# Factors that would make people more comfortable to visit



The top aspects that would make people more comfortable remain relatively consistent (masks, social distancing and hand sanitiser), though significant drops are seen in the UK for many measures.

## Aspects that would make people more comfortable to attend a convention/ conference

								
	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)
Compulsory wearing of a mask when inside the venue	49%	46%	46%	46%	56%	57%	63%	62%
Mandatory use of hand sanitizer at every entrance	48%	52%	47% *F	50%	48%	52%	52%	55%
Proper social distancing guidance (e.g. spacing between people/ groups)	45%	55% (A)	48%	53%	42%	46%	54%	54%
Event staff wearing masks and gloves	43%	45%	43%	49%	33%	40% (A)	51%	56%
No cash payments within the venue (contactless only)	35%	38%	30%	26%	21%	23%	23%	30% (A)
Transparent dividers between seats	33%	40% (A)	35%	35%	38%	39%	36%	36%
Compulsory wearing of gloves when inside venue	25%	34% (A)	29%	38% (A)	26%	29%	26%	38% (A)
None of these would make me feel more comfortable	14%	11%	13% *F	12%	14%	11%	12%	9%



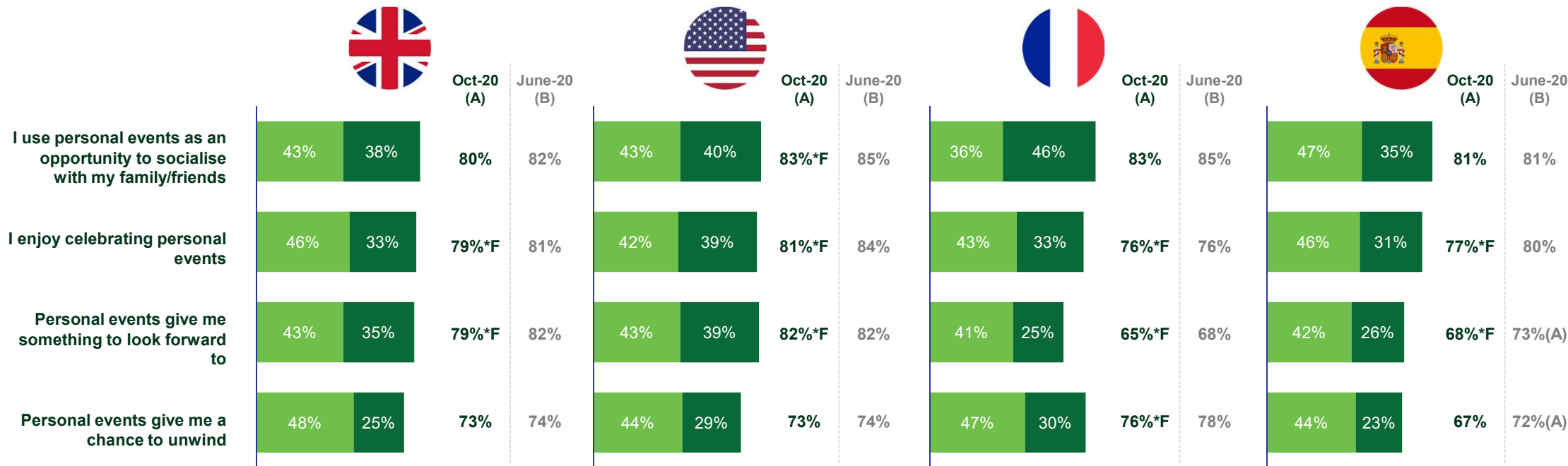
# Perception of Personal Events

# Reasons for attending



The vast majority continue to use personal events for a wide variety of reasons, although giving something to look forward to has become less important in the UK, France and Spain and giving a chance to unwind has become less important in Spain.

## Drivers for attending personal events



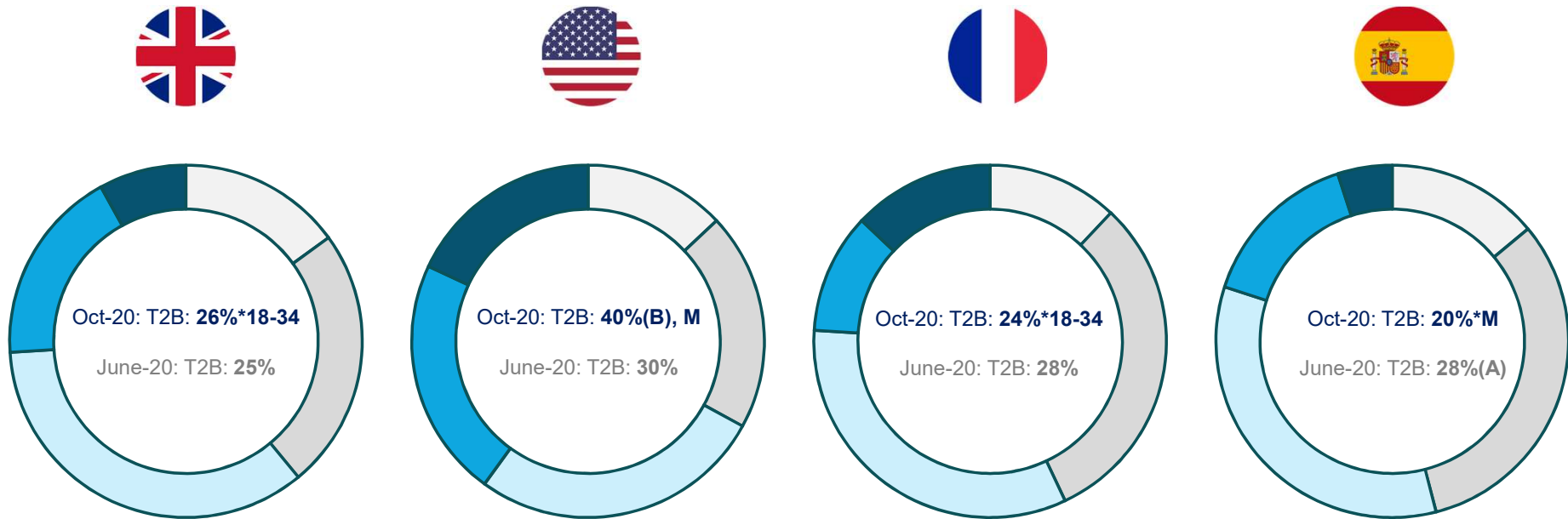
KEY:  Agree  Strongly agree

# Level of comfort in attending – T2B score



Comfort levels in attending a personal event in a hall have improved significantly in the US (driven by males), where now 1 in 4 feel very/extremely comfortable attending this event type. Scores for the UK and France remain consistent while Spain shows a decrease.

## Level of comfort with attending a personal event



**Significance key:**  
 • Oct-20 (A)  
 • June-20 (B)



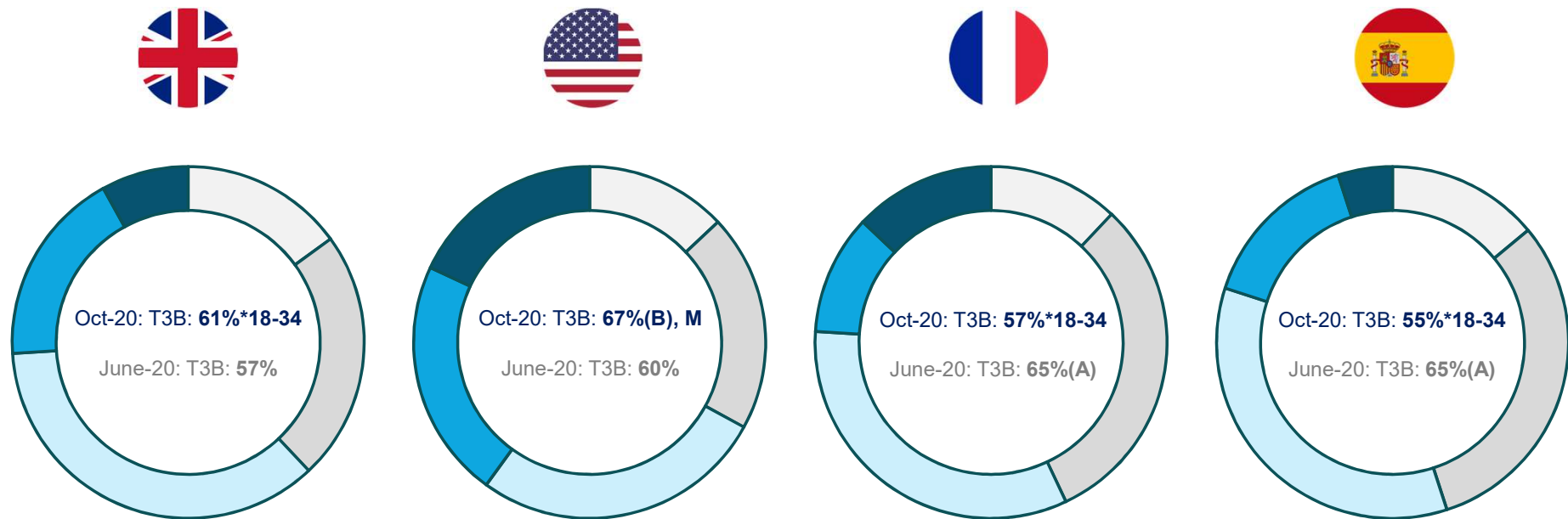
MQ23. How comfortable would you feel about attending a personal event in a hall or similar venue, as soon as they open again?  
 Base: All who have attended a personal event: Oct-20: UK (n=757), USA (n=623), FR (n=745), ES (n=841)  
 June-20: UK (n=791), USA (n= 883), FR (n=800), ES (n=999)

## Level of comfort in attending – T3B score

Comfort levels for T3B scores are again highest in the US, followed by the UK (and significantly so for the US versus last wave). The scores for France and Spain decreased although still over half of them are feeling at least somewhat comfortable in attending these events in the future.



### Level of comfort with attending a personal event



**Significance key:**

- Oct-20 (A)
- June-20 (B)

KEY:

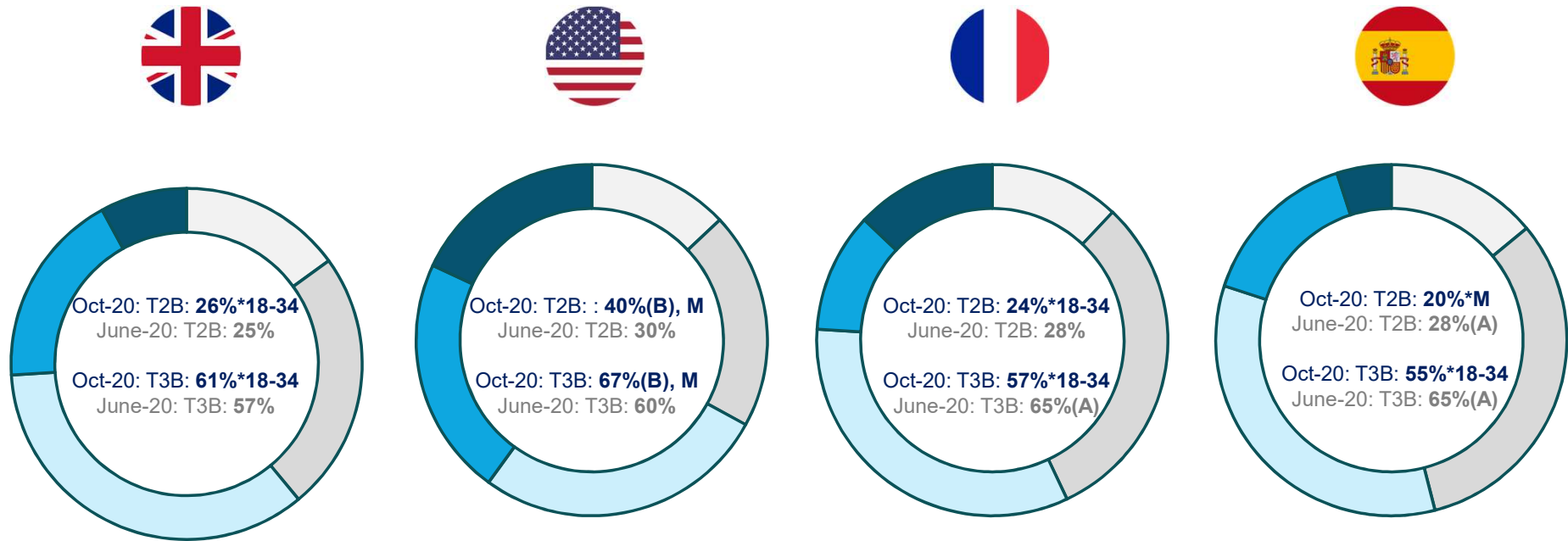


# Level of comfort in attending – T2B and T3B score



Overall, scores between T2B and T3B improved greatly in the US, remained stable for the UK and decreased for Spain.

## Level of comfort with attending a personal event



**Significance key:**  
 • Oct-20 (A)  
 • June-20 (B)



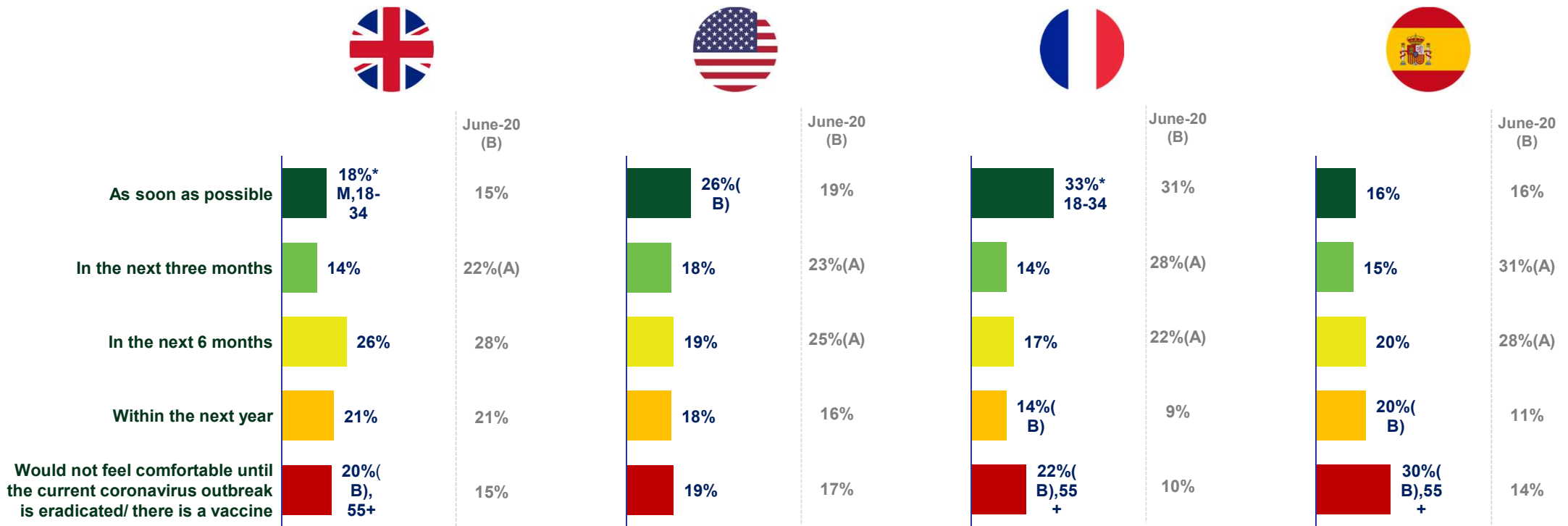
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# Timeframe of when people would feel comfortable again



People in France continue to be the most likely to want to attend a personal event as soon as possible, but there has also been a significant increase in this group in the US versus last wave. There have been significant increase in people not feeling comfortable since the last wave in the UK and, particularly France and Spain.

## When people would attend a personal event

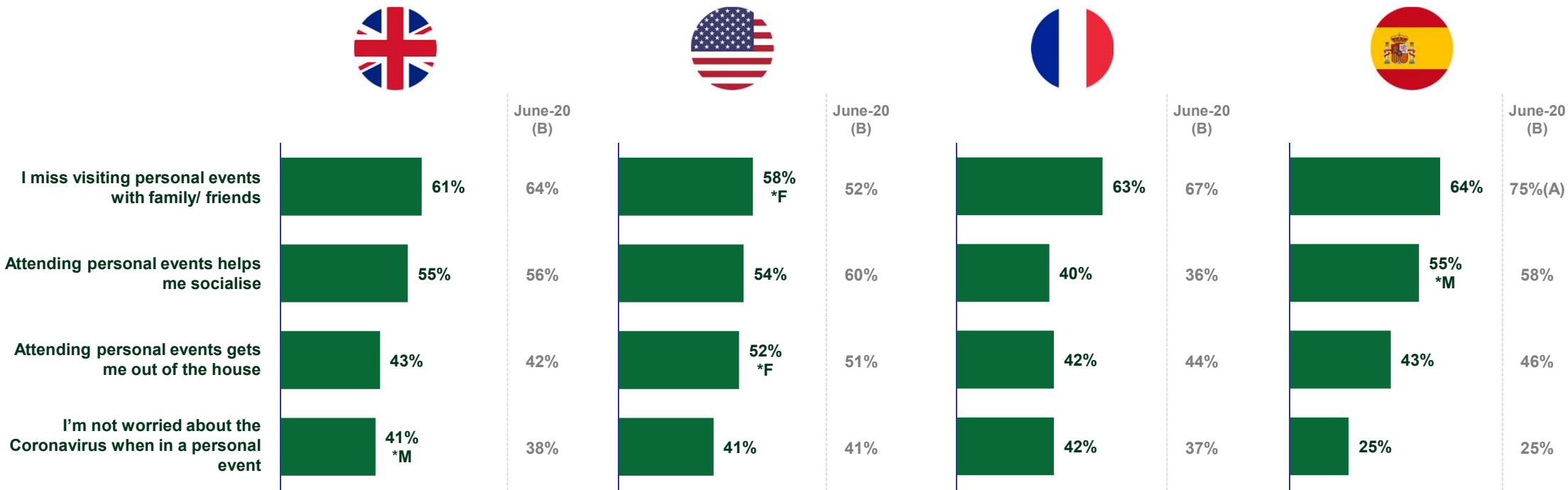


# Of those who feel comfortable enough to attend – reasons why



Missing personal visits with family / friends and attending events to socialise continue to be the most important reasons for attending them across all markets.

## Reasons for feeling comfortable enough to attend a personal event



Data ranked by UK

MQ24. You've mentioned that you would feel comfortable attending a personal event in a hall or similar venue, as soon as they open again. Which of the following reasons best describe why you feel this way?

Base: All who feel comfortable attending a personal event: Oct-20: UK (n=196), USA (n=250), FR (n=177), ES (n=169)  
 June-20: UK (n=195), USA (n=267), FR (n=223), ES (n=276)

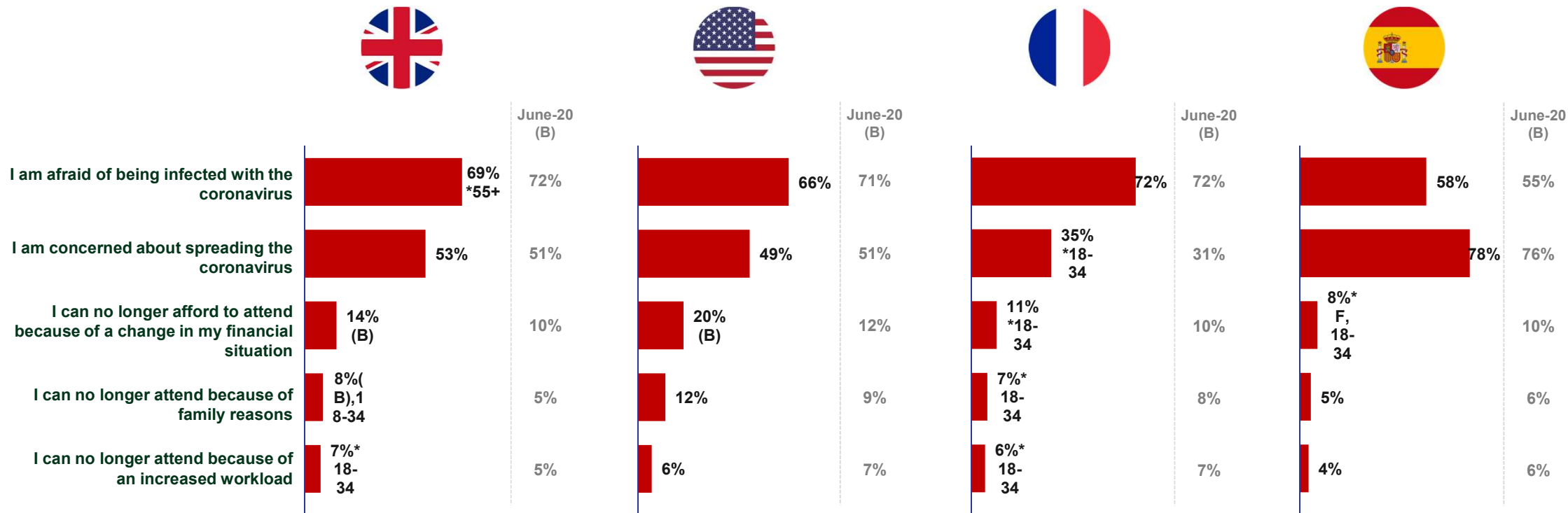


# Of those who do not feel comfortable enough to attend – reasons why



Around 1 in 7 in the UK, US and France are afraid of being infected with the coronavirus. People in Spain continue to be more concerned about spreading the coronavirus.

## Reasons for not feeling comfortable enough to attend a personal event



Data ranked by UK

MQ25. You've mentioned that you would not feel fully comfortable attending a personal event, as soon as they open again. Which of the following factors contribute to this level of comfort?

Base: All who do not feel comfortable attending a personal event: Oct-20: UK (n= 562), USA (n=373), FR (n= 568), ES (n= 672)  
June-20: UK (n=596), USA (n=616), FR (n=577), ES (n=722)

# Factors that would make people more comfortable to visit



People in all countries still would feel more comfortable with mandatory use of hand sanitizers and proper social distancing in personal event venues (though the latter continues to score slightly lower for France). French and Spanish people also place more of an emphasis on the compulsory wearing of masks inside the venue and the UK, US and Spain continue to want event staff to wear masks and gloves.

## Aspects that would make people more comfortable to attend a personal event



	UK		USA		FR		ES	
	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)	Oct-20 (A)	June-20 (B)
Mandatory use of hand sanitizer at every entrance	49%	52%	45%	48%	50%	47%	53%	56%
Proper social distancing guidance (e.g. spacing between people/ groups)	47%(B)	52%	46%	53%(A)	39%	36%	51%	54%
Event staff wearing masks and gloves	44%	41%	43%	49%(A)	30%*M	28%	52%*M	53%
Compulsory wearing of a mask when inside the venue	40%(B)	33%	43%	44%	51%(B), M, 55+	39%	59%(B)	53%
No cash payments within the venue (contactless only)	34%	34%	24%	25%	18%(B), M	14%	22%	25%
Transparent dividers between people/ groups	30%*F	28%	26%	27%	20%	18%	29%	27%
Compulsory wearing of gloves when inside venue	22%	27%(A)	27%	31%	19%	16%	22%	29%(A)
None of these would make me feel more comfortable	19%	18%	19%*F	16%	23%, F	23%	19%(B)	12%

A composite image showing a woman in a dark top and glasses sitting in a light-colored lounge chair on the left, and a flight attendant in a white shirt and dark skirt serving a passenger on the right. A semi-transparent white rounded rectangle is overlaid in the center, containing the title text.

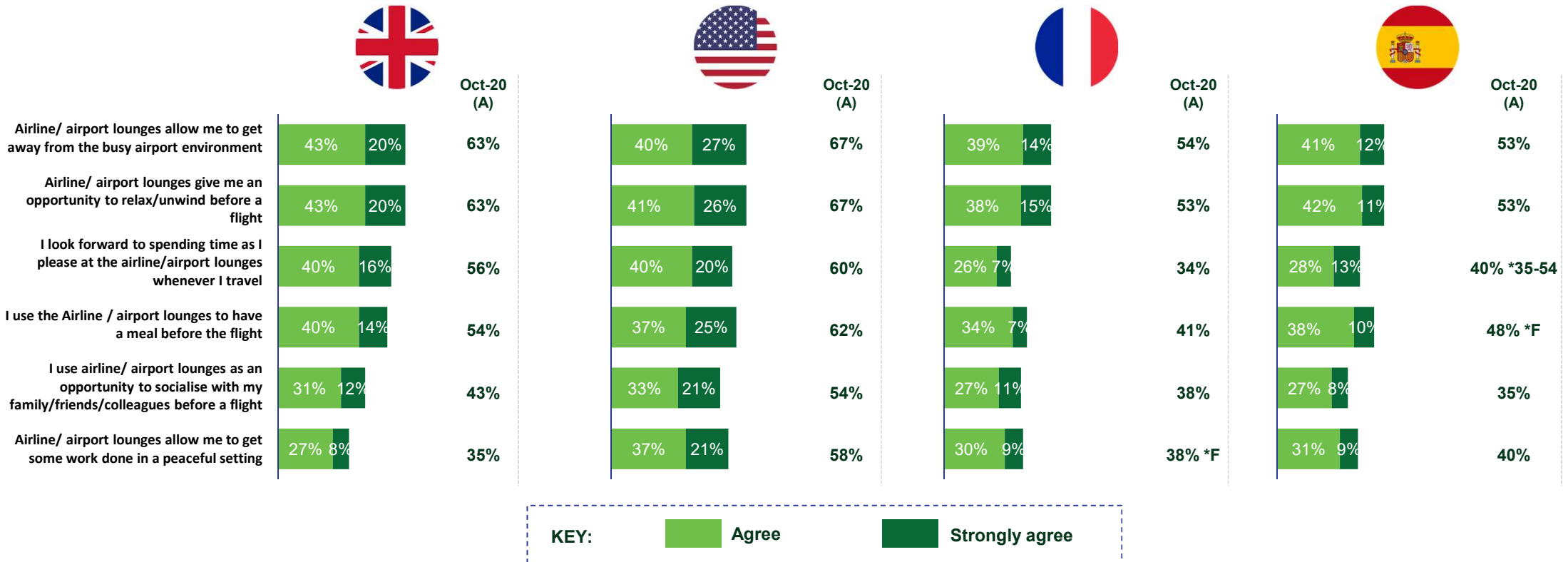
# Perception of Airline/ Airport Lounges

# Reasons for attending



The drivers for visiting airport lounges are stronger in US and UK than in France and Spain. The strongest drivers vary between countries but relaxing /unwinding and getting away from the busy airport environment are strong across all.

## Drivers for visiting airport/ airline lounges

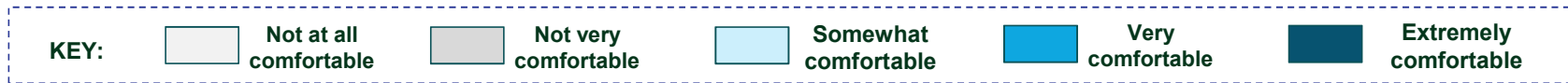
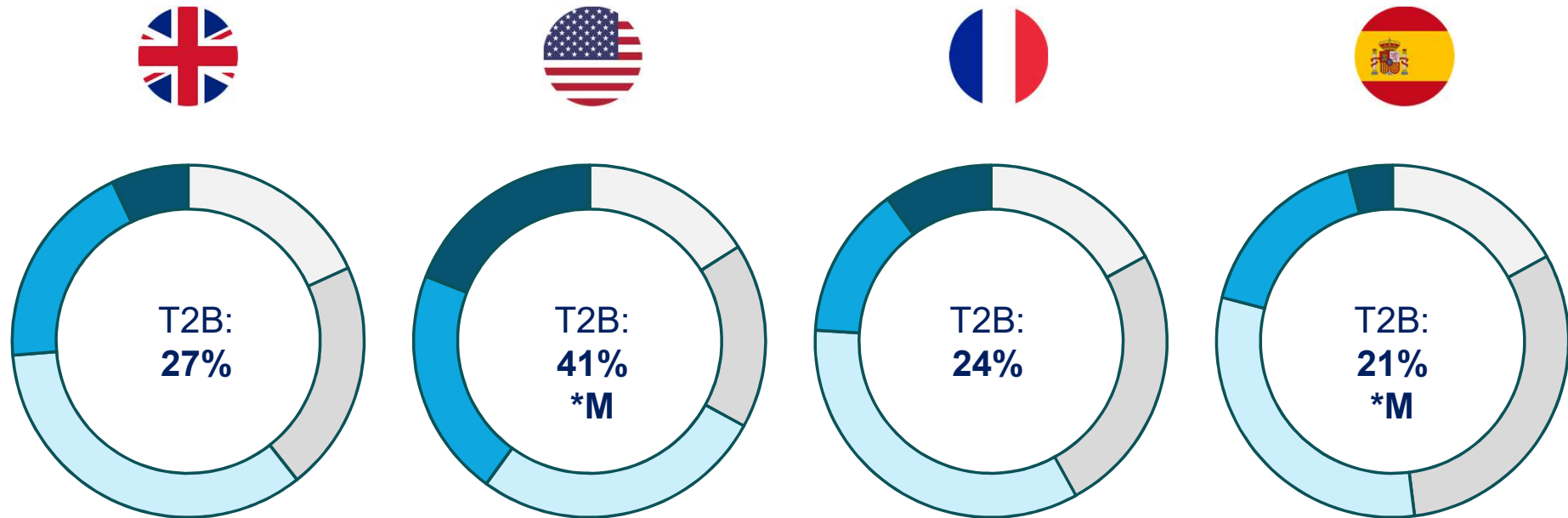


## Level of comfort in visiting – T2B score



US people are, by far, feel the most comfortable with visiting airport lounges – driven by males. Around a quarter in the UK and France feel comfortable while Spain's comfort is the lowest.

### Level of comfort with visiting airport/ airline lounges

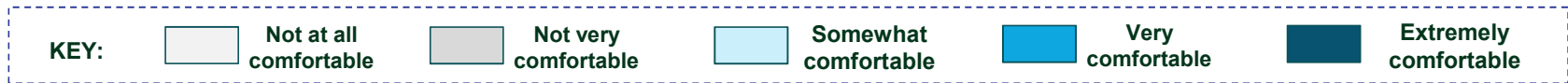
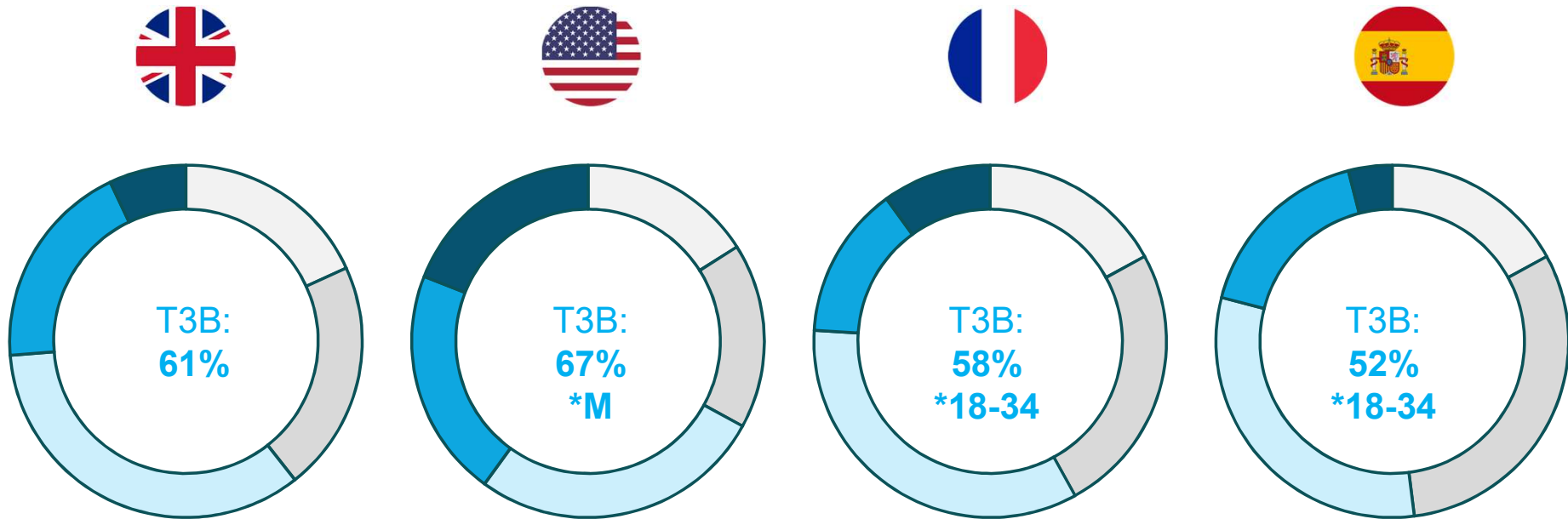


# Level of comfort in visiting – T3B score

The majority feel at least somewhat comfortable with visiting lounges – USA being the highest at almost 7 in 10.



## Level of comfort with visiting airport/ airline lounges

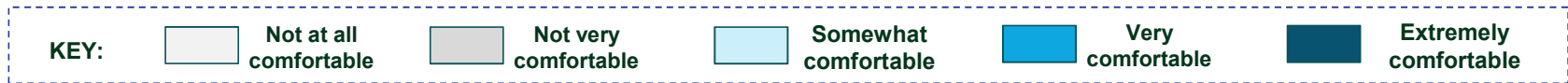
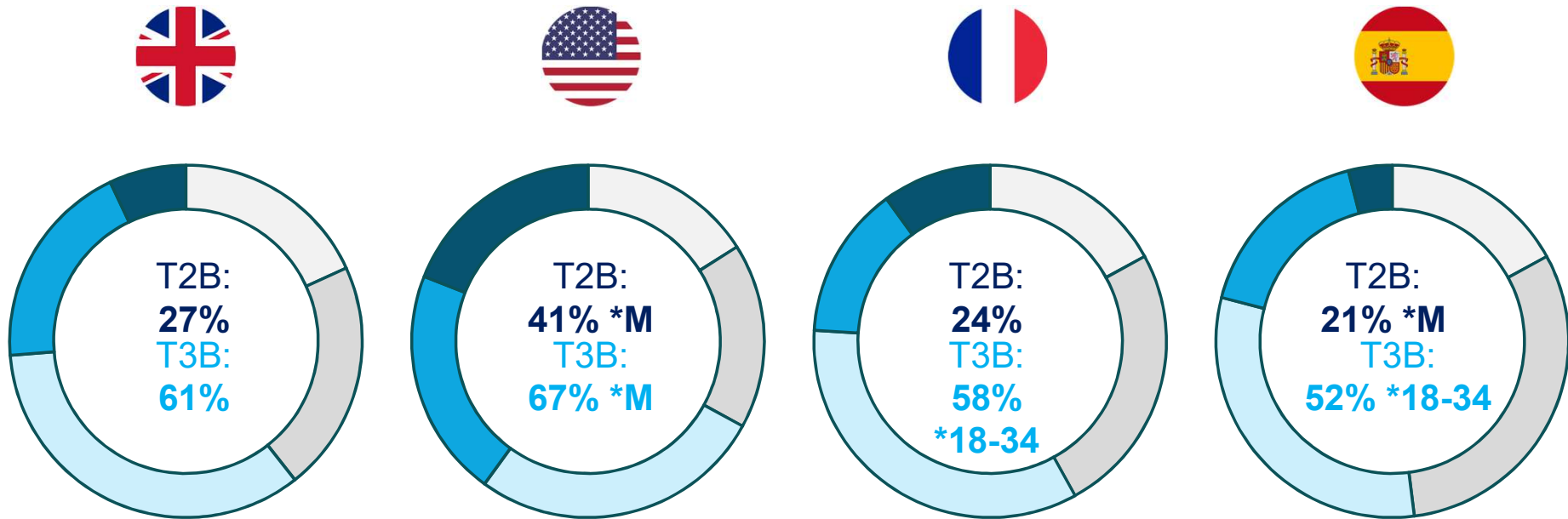


# Level of comfort in visiting – T2B and T3B score



When combined, T3B scores emphasise the view that people (and especially males in the US) feel at least somewhat comfortable in visiting airport lounges next time they fly.

## Level of comfort with visiting airport/ airline lounges

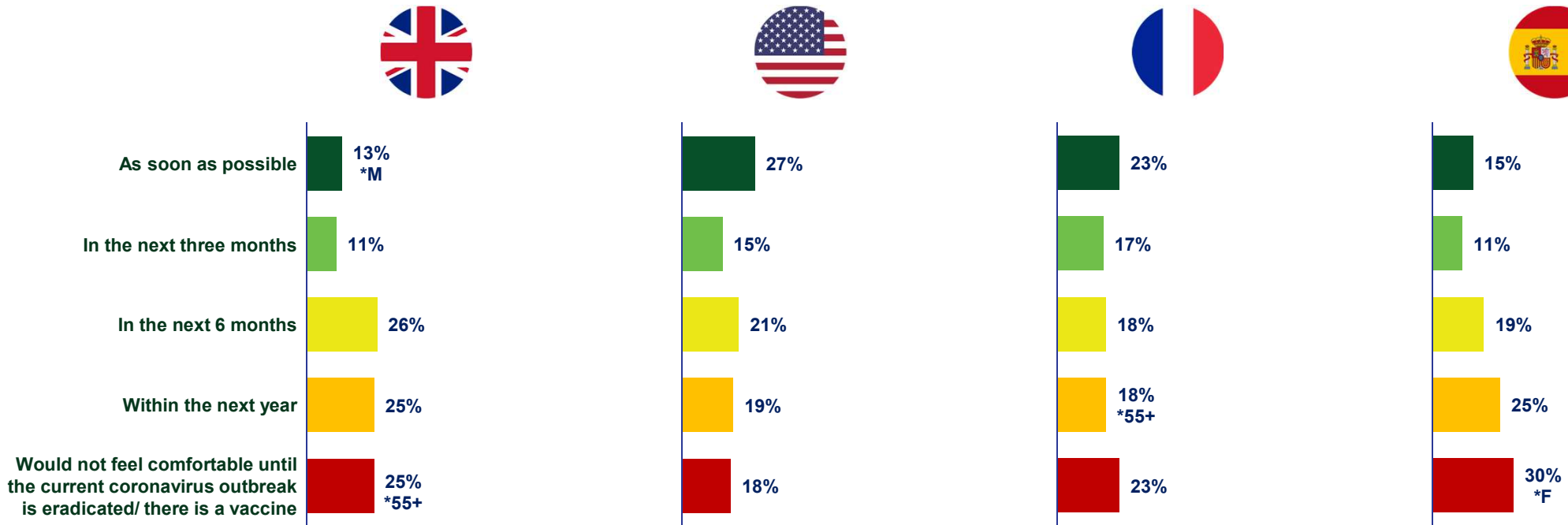


# Timeframe of when people would feel comfortable again



The intention to return to airport lounges ASAP varies between countries with the US and France being more likely than others. Spain is the least likely with 1 in 3 not motivated to visit prior to a vaccine being available.

## When people would be visiting airport/ airline lounges



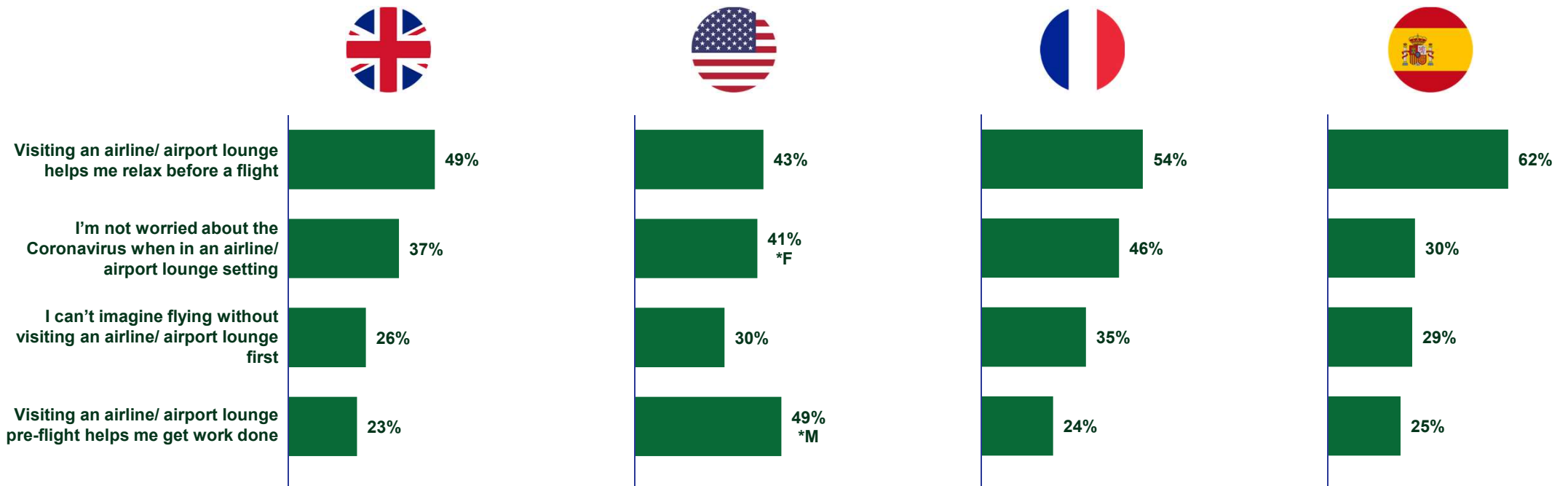


# Of those who feel comfortable enough to attend – reasons why



Pre-flight relaxation is the main reason for feeling comfortable in returning to lounges in all markets. Getting work done is also a key reason for wanting to return in the US, driven by males. About 1 in 4 in all markets except for Spain are not worried about coronavirus when in an airline lounge setting.

**Reasons for feeling comfortable visiting airport/ airline lounges**

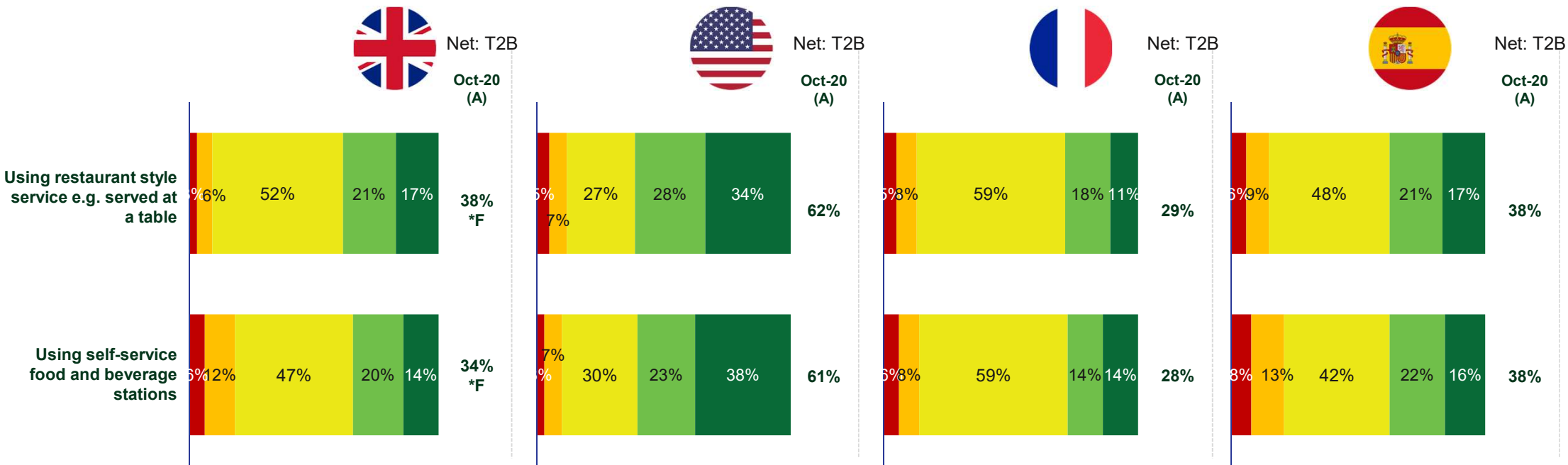


# How likely people are to consume food & beverages at each location



There are no differences in likelihood to usage across format types. People in the US are the most likely to consume food and beverages the next time they visit an airport lounge, followed by the UK and Spain.

## Likelihood to consume food & beverages at each location

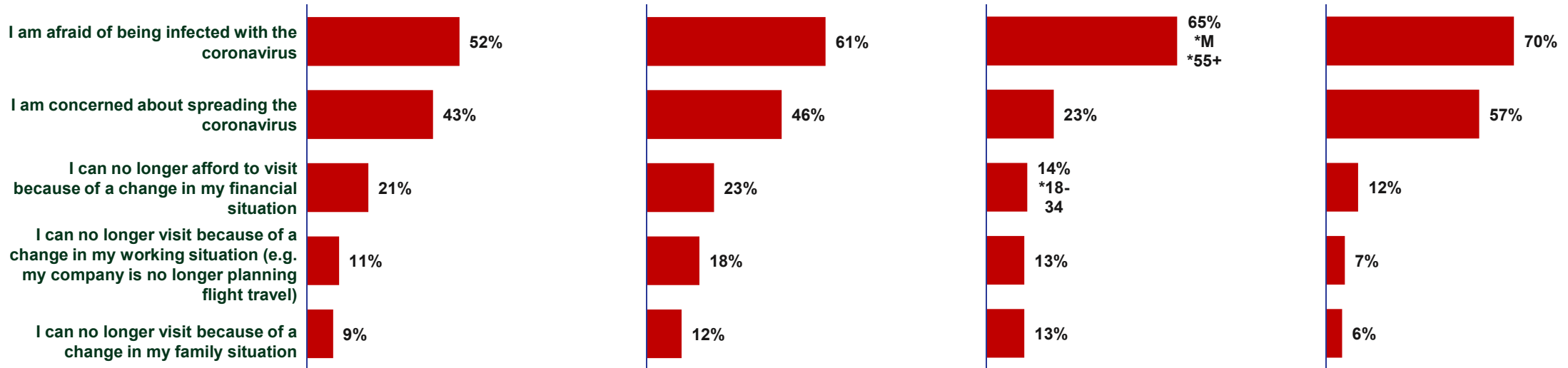
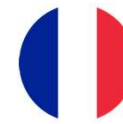


# Of those who do not feel comfortable enough to attend – reasons why



Risk of being infected is, by far, the main reason for avoiding, followed by the risk of spreading the infection. Other, non-Coronavirus, factors are less important.

## Reasons for not feeling comfortable enough to visit an airport/ airline lounge







# Factors that would make people more comfortable to visit



For the majority there is at least one way to make them more comfortable in returning to lounges. Sanitizer, social distancing and wearing of masks and gloves are key to increasing comfort.

## Aspects that would make people more comfortable to visit an airport/ airline lounge

				
Lounge staff wearing masks and gloves	46%	41%	42%	55%
Mandatory use of hand sanitizer at every entrance	44%	43%	53%	57%
Proper social distancing guidance (e.g. spacing between people/ groups)	42%	42%	45% *55+	58%
Compulsory wearing of a mask when inside the lounge	38%	42%	52%	63%
No cash payments within the lounge (contactless only)	30%	31%	25%	28%
Transparent dividers between people/ groups	29%	34%	33%	39%
Compulsory wearing of gloves when inside lounge	17%	34%	29%	27%
None of these would make me feel more comfortable	9%	14%	12%	17%

# Demographics: Oct-20



## Gender



	Oct-20	June-20
<b>Females</b>	49%	50%
<b>Males</b>	51%	50%



	Oct-20	June-20
<b>Females</b>	60%	50%
<b>Males</b>	39%	50%

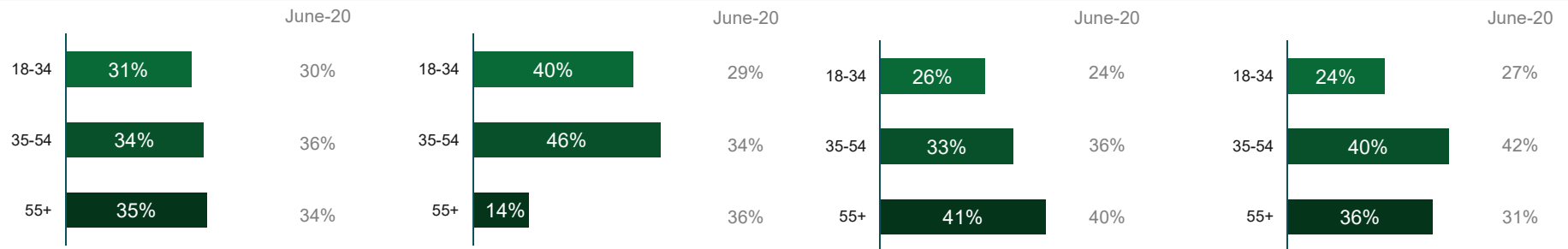


	Oct-20	June-20
<b>Females</b>	47%	53%
<b>Males</b>	53%	47%



	Oct-20	June-20
<b>Females</b>	46%	48%
<b>Males</b>	54%	52%

## Age



## Region

	Oct-20	June-20		Oct-20	June-20		Oct-20	June-20		Oct-20	June-20
<b>North &amp; Scotland</b>	32%	26%	<b>Midwest</b>	26%	21%	<b>Ile-de-France</b>	22%	25%	<b>Centro</b>	23%	27%
<b>Midlands &amp; Wales</b>	24%	22%	<b>North East</b>	17%	26%	<b>Nord Est</b>	24%	19%	<b>Este</b>	30%	26%
<b>South</b>	43%	50%	<b>South</b>	45%	36%	<b>Nord Ouest</b>	23%	23%	<b>Norte</b>	17%	21%
<b>Northern Ireland</b>	1%	2%	<b>West</b>	12%	15%	<b>Sud Est</b>	22%	20%	<b>Oeste</b>	6%	4%
						<b>Sud Ouest</b>	9%	14%	<b>Sur</b>	24%	23%