



Priority Pass Retail Customer Travel Sentiment Survey

A global overview of the future of air travel
amid COVID-19 pandemic

July 2020



Prepared by
Research & Insight Team

Introduction



Collinson are looking to explore the way COVID-19 pandemic has impacted and will continue to impact Priority Pass customers and their air travel plans, the current level of confidence in regards to resuming air travel and what could potentially encourage customers to feel more confident about air travel in the foreseeable future.

The report will uncover insights into how air travel habits and behaviours are changing, what the main reasons for those changes are, what measures could restore confidence in air travel as well as what social distancing services consumers are willing to use and even pay for. The findings provide evidence that although travel demand is not going to pick up immediately, travel as a whole is still important to Priority Pass members and the airport lounge is still seen as a valuable service. The report discusses the mentioned above points through a number of sections:



Demographic Profile



Pre-COVID-19 Air Travel



COVID-19 Effect On Air Travel Plans



Post-COVID-19 Travel Behaviour



Post-COVID-19 Perception Of Airport Lounges



Methodology

Online survey (English only) distributed globally through the Priority Pass June Newsletter



Method of Data Collection

Online survey conducted by Collinson's Research & Insight Team.

Fieldwork from 19th June 2020 to 3rd July 2020 (15 days).



Target Audience

Members of the Priority Pass airport lounges programme

Adults 18+



Number of survey respondents

Worldwide

Africa	n – 202
APAC	n – 8,138
Europe	n – 5,837
Middle East	n – 302
North America	n – 4,641
Central America	n – 101
South America	n – 3,335
The Caribbean	n – 222
All	n – 22,778

Demographic Profile



Demographic Profile Of Survey Respondents

REF: QA – Please indicate your age; QB – Please indicate your gender; QC – In which region do you live?



Age group

18 - 24 years old	1%
25 - 34 years old	15%
35 - 44 years old	22%
45 - 54 years old	24%
55 - 64 years old	23%
65+ years old	14%
Prefer not to say	2%



Gender

Male	63%
Female	35%
Prefer not to say	2%



Region

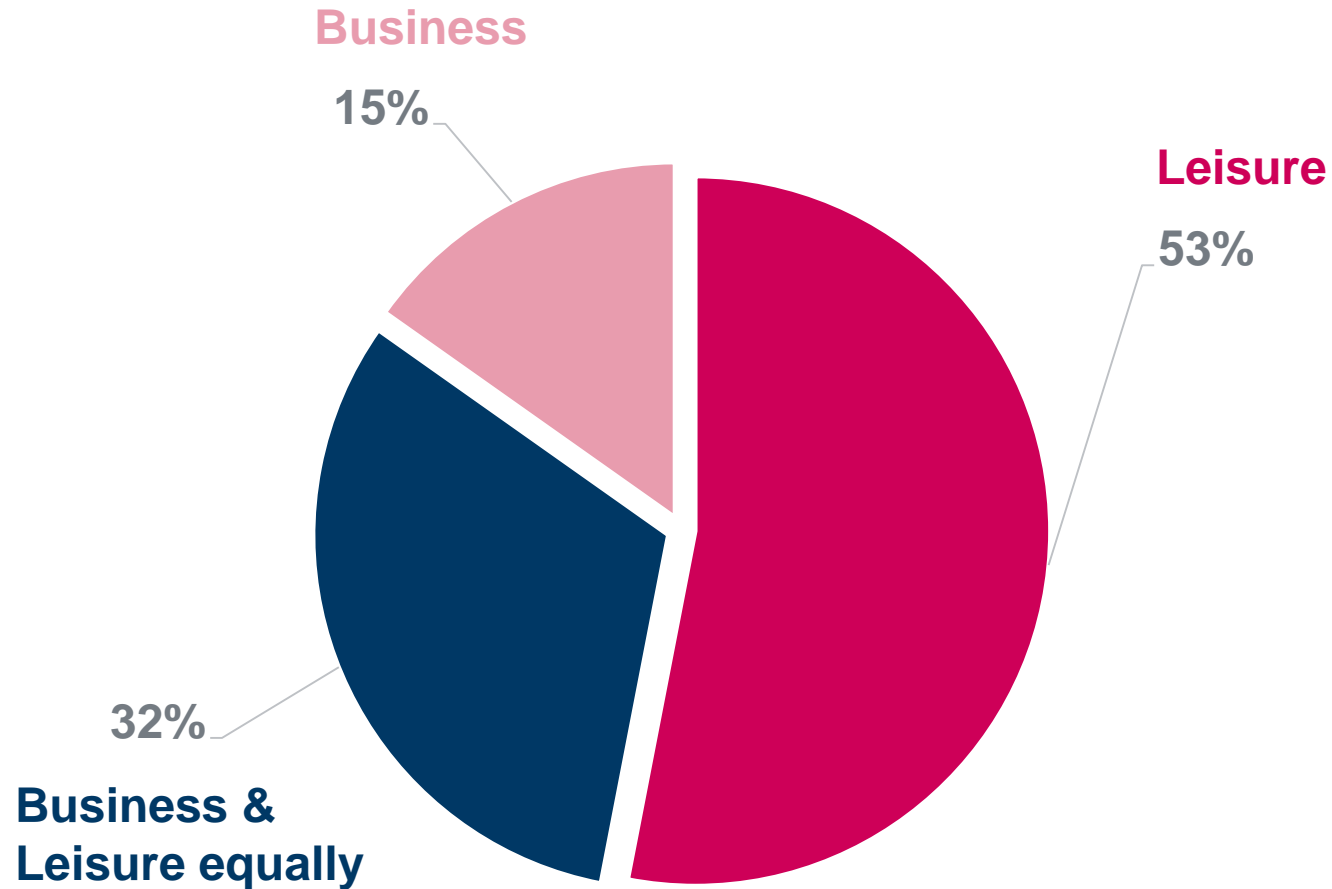
Europe	26%
APAC	36%
North America	20%
Central America	0%
South America	15%
Africa	1%
Middle East	1%
The Caribbean	1%

Pre-COVID-19 Air Travel



Reason for air travel prior to the pandemic

REF: Q2 – What was the main reason for you traveling by air prior to the COVID-19 pandemic?



Prior to the COVID-19 pandemic, the share of travel done solely for business reasons was quite low (only 15%).

The majority of Priority Pass members used to travel for leisure (53%) or combine business and leisure travel (32%).

COVID-19 Effect On Air Travel Plans



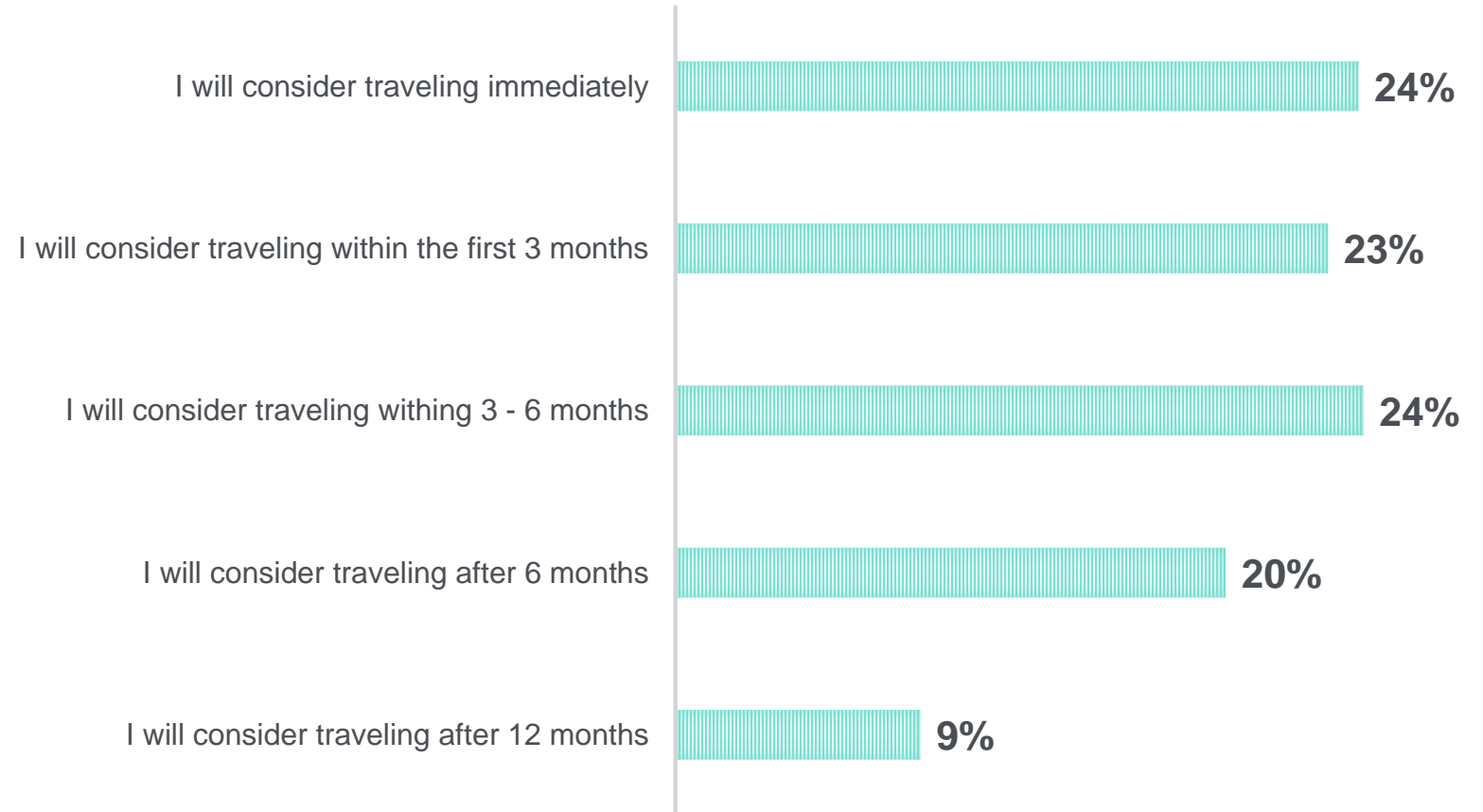
Air Travel Plans & Expectations

REF: Q1 – When the international travel bans are lifted, when will you be willing to travel by air again?

Once the international travel bans are lifted, the vast majority of people would be willing to travel by air sooner rather than later – 71% of respondents indicated that they would be willing to travel either immediately, within the first 3 months or within 3-6 months.

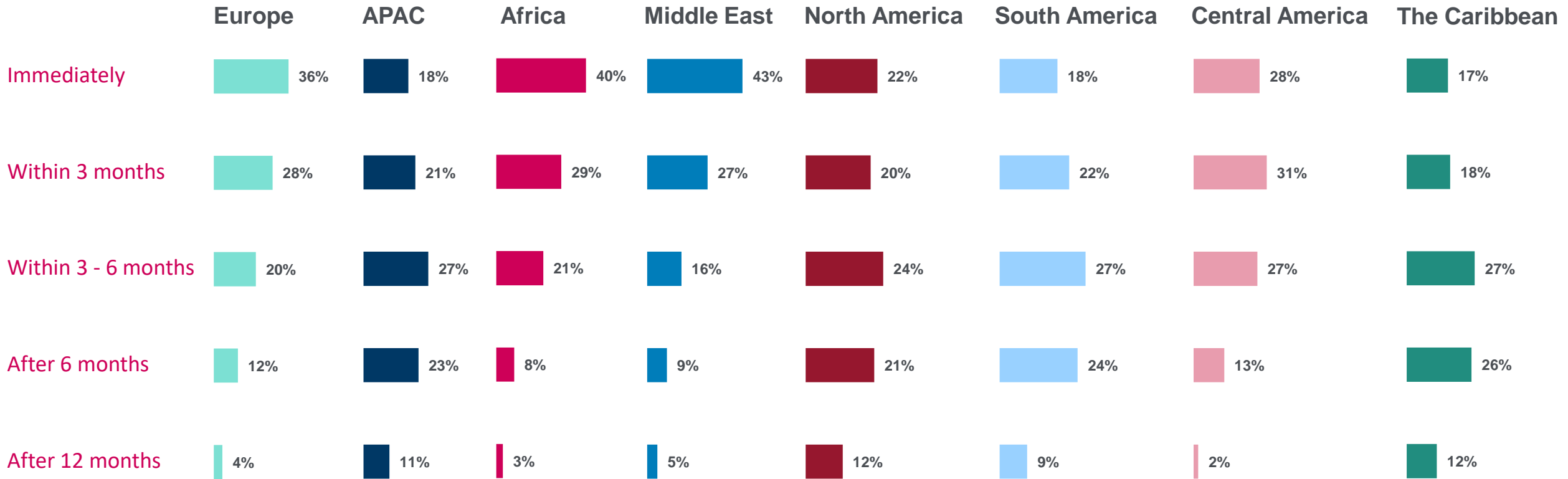
Africa and Middle East seem to be the regions most willing to travel immediately after the travel bans are lifted. However, it should be noted their samples are relatively small in comparison to the other regions.

Although the overall results show readiness for air travel almost as soon as bans are lifted, half of the regions surveyed defer in their willingness to travel (refer to slide 10). In APAC, North America, South America and The Caribbean there is a higher number of people who would be willing to travel either within 3-6 months or after 6-12 months.



Air Travel Plans & Expectations – By Region

REF: Q1 – When the international travel bans are lifted, when will you be willing to travel by air again?



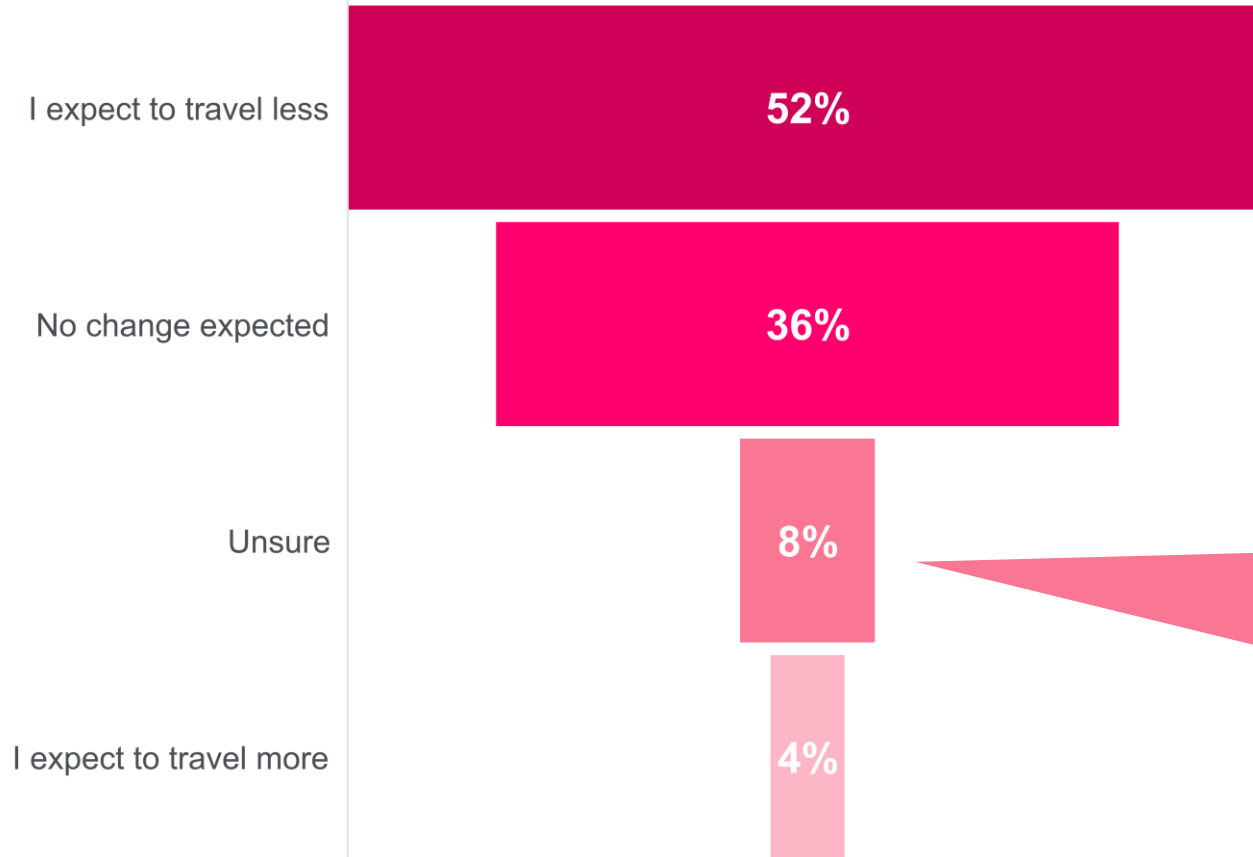
Air Travel Plans & Expectations

REF: Q3 – How do you see COVID-19 impacting your air travel plans going forward?

COVID-19 is likely to cause a decrease in future air travel – just over half of respondents expect to travel less by air in the future.

However, a promising 40% of respondents aren't expecting to change the frequency of their future air travel or are planning to travel even more than before the pandemic. This is especially true for South Americans who seem to be the ones expecting to travel most as a result of the pandemic (refer to slide 12).

There are still people who are adopting a 'wait and see' approach to the situation for various reasons.



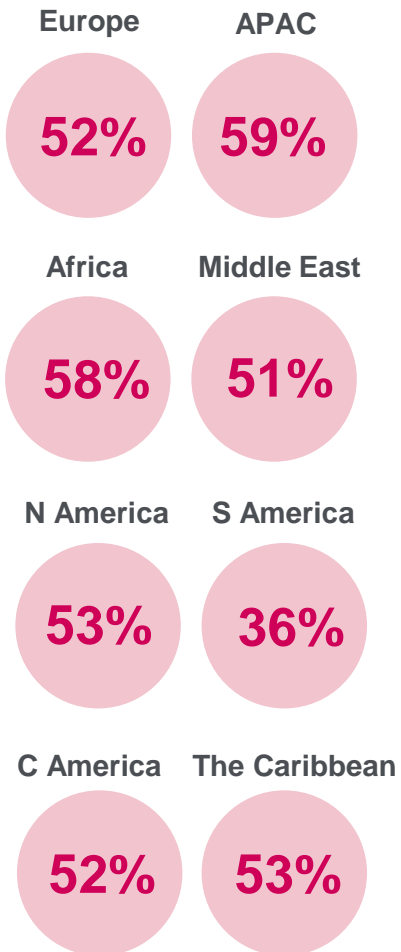
Unsure (8%):

- Depends on infection cycles and vaccine development
- Depends on international travel restrictions
- Depends on business demand and client requirements
- Depends on personal finances and overall cost of air travel
- Depends on whether insurance cover for COVID-19 is offered
- Depends on measures put in place by airports and airlines
- Depends on what countries and airports are 'open'
- Depends on how inconvenient the 'new normal' would be
- No change in frequency of travel but the way travel is done:
 - use of alternative travel options such as car and train
 - planning more domestic (or short distance) travel

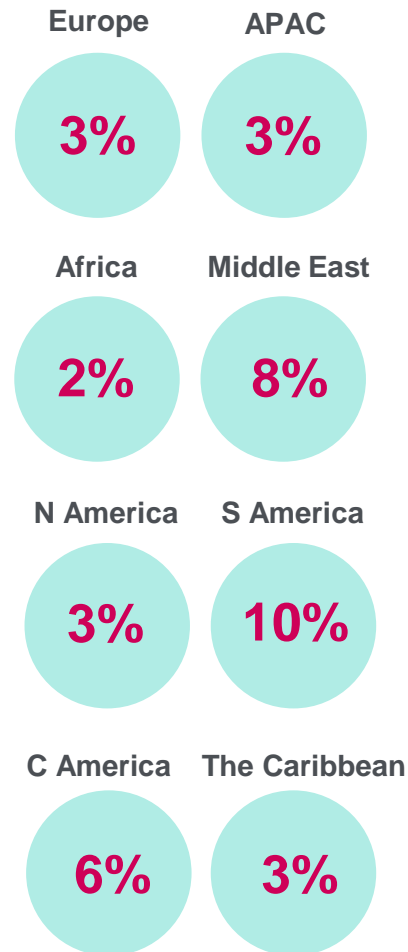
Air Travel Plans & Expectations – By Region

REF: Q3 – How do you see COVID-19 impacting your air travel plans going forward?

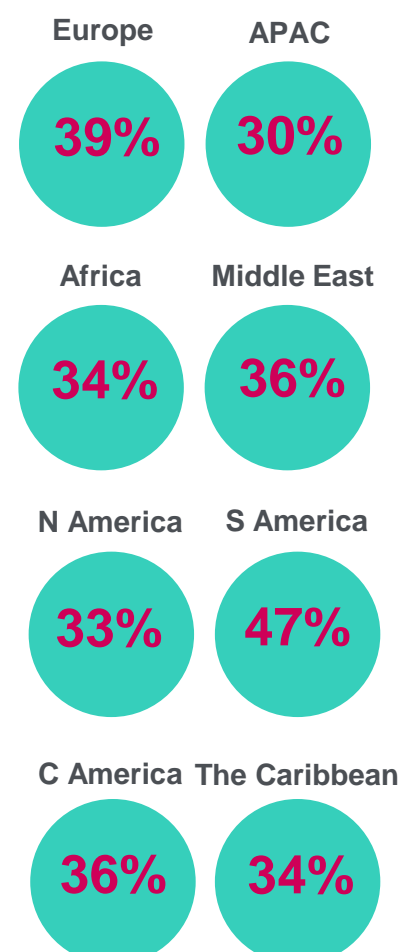
I expect to travel less



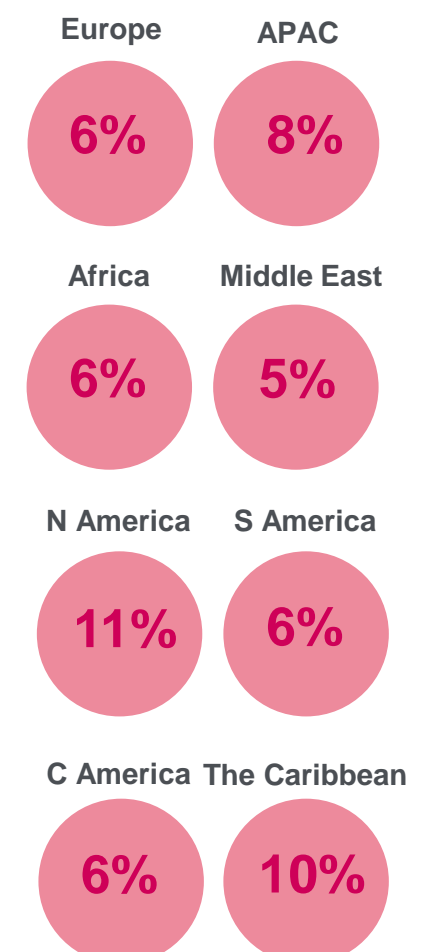
I expect to travel more



No change expected



Unsure



Top 5 Reasons For Reduced Air Travel

REF: Q3a1/Q3a2 – Why do you expect to be travelling less by air?

Leisure Travellers

Top 5 reasons

Travel restrictions and quarantine requirements, both existing and potentially imposed after I have travelled	0.22
Concern over the containment of COVID-19 in specific countries and globally	0.22
Concern about airlines ability to maintain social distancing and create a sanitized environment	0.17
I do not want to travel until there is a COVID-19 vaccine	0.14
Concern about airports ability to maintain social distancing and create a sanitized environment	0.14

Business & Bleisure Travellers*

Top 5 reasons

Travel restriction and quarantine requirements, both existing and potentially imposed after I have travelled	0.20
Concern over the containment of COVID-19 in specific countries and globally	0.17
Increased use of virtual meetings/video calls/business technology	0.12
Concern about airlines ability to maintain social distancing and create a sanitized environment	0.12
Concern about airports ability to maintain social distancing and create a sanitized environment	0.09
I do not want to travel until there is a COVID-19 vaccine	0.09

Leisure and business & bleisure travellers seem to share similar reasons for the expected decrease in their future air travel – travel restrictions and quarantine requirements being the main reason for both groups. However, the order of those top 5 reasons varies slightly. For example, an equally important reason for leisure travellers is the concern over the containment of the virus as opposed to business & bleisure travellers who also selected it as their top 2 reason but gave it a much lower overall score. Unsurprisingly, an additional reason for business & bleisure travellers is the increased use of virtual meetings and video calls, currently allowing companies to conduct business globally with minimum disruption.

Note: This is a ranking question where respondents were asked to give a rank to the different reasons why they expect to travel less by air in order of level of impact – in this case to rank them on a scale of 1-5. A ranking score is calculated for each reason based on the times it has been chosen as 1,2,3,4 or 5. All chosen as top 1 (the main reason) are given a score of 5, top 2 – score of 4, top 3 – a score of 3, top 4 – a score of 2 and top 5 – a score of 1. Finally, each score is divided by the total in order to determine the "share of the votes" score for each consequence. The higher the score, the more impactful a reason is in driving future air travel down.



BASE: Q3a1 n Business & Bleisure Travellers who expect to travel less by air – 6,345.
Q3a2 n Leisure Travellers who expect to travel less by air – 5,613.

***Business & Bleisure travellers** include those who travelled mainly for business and those who travelled equally for business and leisure prior to COVID-19.

Top 5 Reasons For Increased Air Travel

REF: Q3b1/Q3b2 – Why do you expect to be travelling more by air?

Leisure Travellers

Top 5 reasons

To 'catch-up' on postponed travel plans	0.27
Desire to visit family and friends overseas	0.26
Frustration with the lock-down and a desire to 'get away'	0.21
As a result of promotions and incentives which are designed to encourage travel	0.18
Other	0.08
<i>New appreciation for travel as a result of the pandemic</i> <i>Retirement plans</i> <i>'YOLO' mentality</i> <i>To relax and take a break from work</i> <i>Special occasions (weddings, anniversary trips, honeymoon)</i> <i>Visit places while there are no visitor crowds due to the virus</i>	

Business & Bleisure Travellers*

Top 5 reasons

To 'catch-up' on postponed travel plans	0.19
Travel is a requirement of my job	0.16
Desire to visit friends and family overseas	0.13
To support the recovery of my business	0.12
I have missed business travel	0.10
As a result of promotions and incentives which are designed to encourage travel	0.10
Frustration with the lock-down and a desire to 'get away'	0.10

The main reason for both leisure and business & bleisure travellers to expect an increase in their air travel plans is that they need to catch up on postponed travel plans. However, while for leisure travellers the desire to visit family and friends as well as the frustration of the lockdown are other major reasons, business & bleisure travellers tend to expect more travel by air since it's a requirement for their job. Overall, leisure travellers seem to have agreed more on the main reasons for an expected increase in air travel whereas business & bleisure travellers have given relatively similar scores to all the different reasons listed.

Note: This is a ranking question where respondents were asked to give a rank to the different reasons why they expect to travel more by air in order of level of impact – in this case to rank them on a scale of 1-5. A ranking score is calculated for each reason based on the times it has been chosen as 1,2,3,4 or 5. All chosen as top 1 (the main reason) are given a score of 5, top 2 – score of 4, top 3 – a score of 3, top 4 – a score of 2 and top 5 – a score of 1. Finally, each score is divided by the total in order to determine the "share of the votes" score for each consequence. The higher the score, the more impactful a reason is in driving future air travel up.



BASE: Q3b1 n Business & Bleisure Travellers who expect to travel more by air – 416.
Q3b2 n Leisure Travellers who expect to travel more by air – 547.

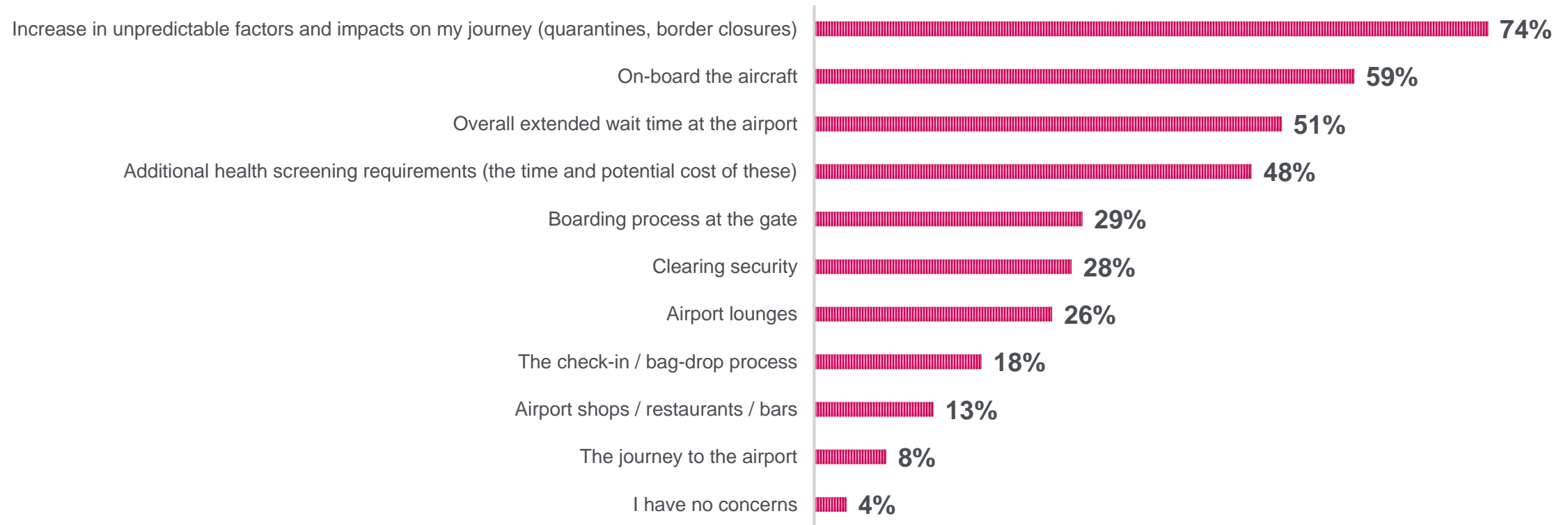
***Business & Bleisure travellers** include those who travelled mainly for business and those who travelled equally for business and leisure prior to COVID-19.

Post-COVID-19 Travel Behaviour



Air Travel Concerns Due To COVID-19

REF: Q4 – Thinking about your next trip by air and COVID-19, what specific aspects of the journey are you most concerned about?



Most respondents have multiple concerns when it comes to their next trip by air but overall the top ones appear to be the increase in unpredictable factors (and their impact on the journey), the aircraft on-boarding process, the extended wait time at the airport and the additional health screening requirements.

Just over a quarter of respondents said they are worried about the airport lounges as an aspect of the overall journey, demonstrating that the lounge is potentially seen as an escape from the airport crowds.

Top 5 measures to encourage future air travel confidence

REF: Q5 – Which of the following measures would make your more confident about traveling by air?

In terms of airport measures that could encourage confidence in future air travel, respondents see enforced social distancing, sanitising protocols and visible cleaning processes, access to private areas such as airport lounges and the widespread access to sanitising gel stations as the most promising of all measures listed on the survey.

The fact that all top 4 measures received the same overall score emphasises the need to provide a holistic solution that tackles the problem on a few levels, allowing all different types of travellers to feel safe and comfortable enough to go back to the airport.

At The Airport



1. Social distancing enforced across the airport (Score: 0.14)
2. Sanitizing protocols in the airport (compulsory facemasks/screens etc.) (Score: 0.14)
3. Access to self-contained, private areas such as an airport lounge (Score: 0.14)
4. High profile/visible cleaning processes and protocols in the airport (Score: 0.14)
5. Widespread access to sanitising gels/sanitising stations in the airport (Score: 0.13)

Note: This is a ranking question where respondents were asked to give a rank to the measures that would make them more confident about travelling by air in order of preference – in this case to rank them on a scale of 1-5. A ranking score is calculated for each measure based on the times it has been chosen as 1,2,3,4 or 5. All chosen as top 1 are given a score of 5, top 2 – score of 4, top 3 – a score of 3, top 4 – a score of 2 and top 5 – a score of 1. Finally, each score is divided by the total in order to determine the "share of the votes" score for each measure. The higher the score, the more a measure makes respondents confident about future air travel.

Top 5 measures to encourage future air travel confidence

REF: Q5 – Which of the following measures would make your more confident about traveling by air?

In terms of measures taken on the aircraft, travellers would like to see flight capacity restricted, temperature checks conducted for all passengers before boarding, facemasks being compulsory for the whole duration of the journey, visible cleaning processes and protocols on the aircraft and a limited passenger movement during the flights.

On The Aircraft

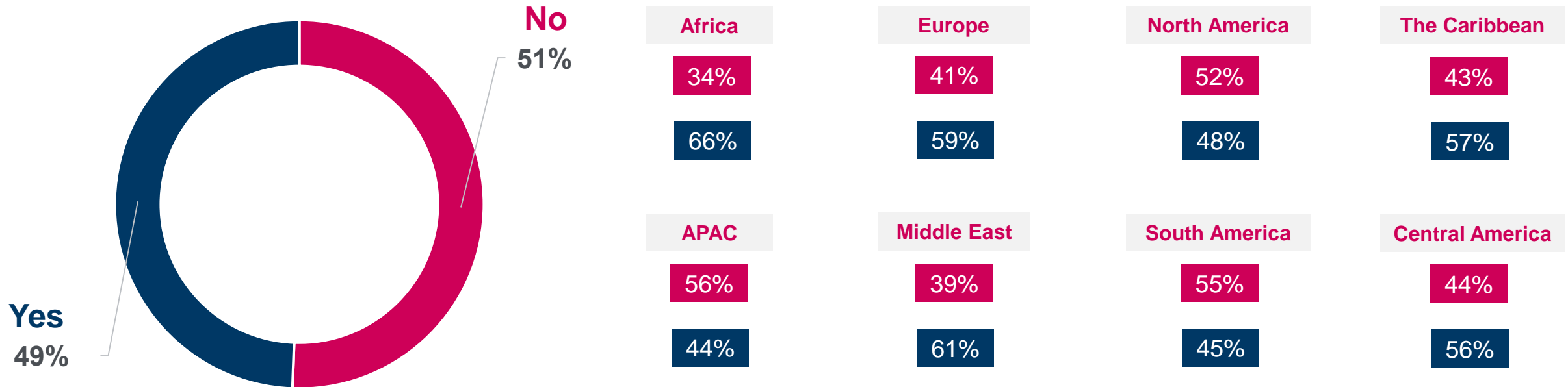


1. Knowing flight capacity will be restricted (i.e. middle seat blocked) (Score: 0.20)
2. All passenger's temperature checked before boarding (Score: 0.19)
3. Facemasks being compulsory from departure gate to arrival gate (Score: 0.19)
4. High profile / visible cleaning processes and protocols on the aircraft (Score: 0.17)
5. Limiting passenger movement on-board the aircraft (Score: 0.12)

Note: This is a ranking question where respondents were asked to give a rank to the measures that would make them more confident about travelling by air in order of preference – in this case to rank them on a scale of 1-5. A ranking score is calculated for each measure based on the times it has been chosen as 1,2,3,4 or 5. All chosen as top 1 are given a score of 5, top 2 – score of 4, top 3 – a score of 3, top 4 – a score of 2 and top 5 – a score of 1. Finally, each score is divided by the total in order to determine the "share of the votes" score for each measure. The higher the score, the more a measure makes respondents confident about future air travel.

Paying For a COVID-19 Test At The Airport

REF: Q6 – Would you be willing to pay for COVID-19 testing at the airport to ease any travel/quarantine restrictions that may be in place?;
 Q7 – How much would you expect to pay (\$USD) for a COVID-19 test at the airport?



Half of travellers are currently willing to pay for a COVID-19 test at the airport in order to ease any travel restrictions that may be in place within a given destination. However, travellers from some regions tend to be more willing to pay for a test than others – 66% of African, 59% of European and 61% of Middle Eastern respondents said they would be willing to pay for such a test.

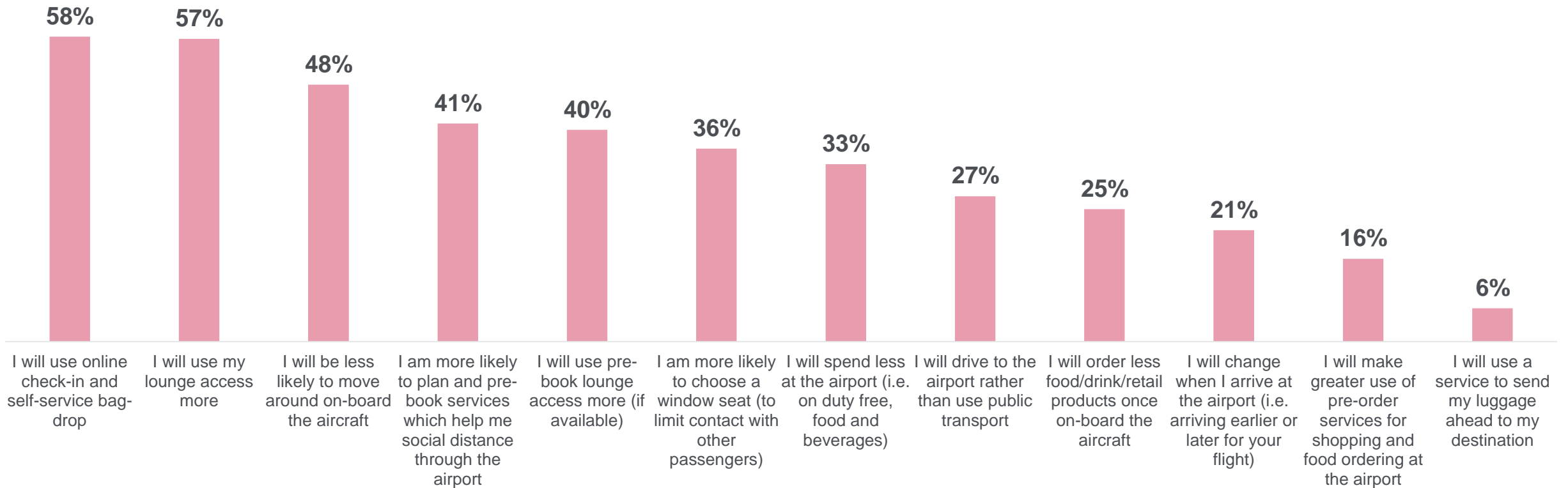
The vast majority of people tend to agree on the price they would expect to pay for a COVID-19 test conducted at the airport – 94% agreed they would expect to pay \$100 - \$125 for it.

94% Of those who would be willing to pay for a test expect to pay \$100 - \$125 for it

Changes In Air Travel Behaviour

REF: Q8 – Thinking about the next time you travel by air, how do you think your behaviour will be different from previous journeys?

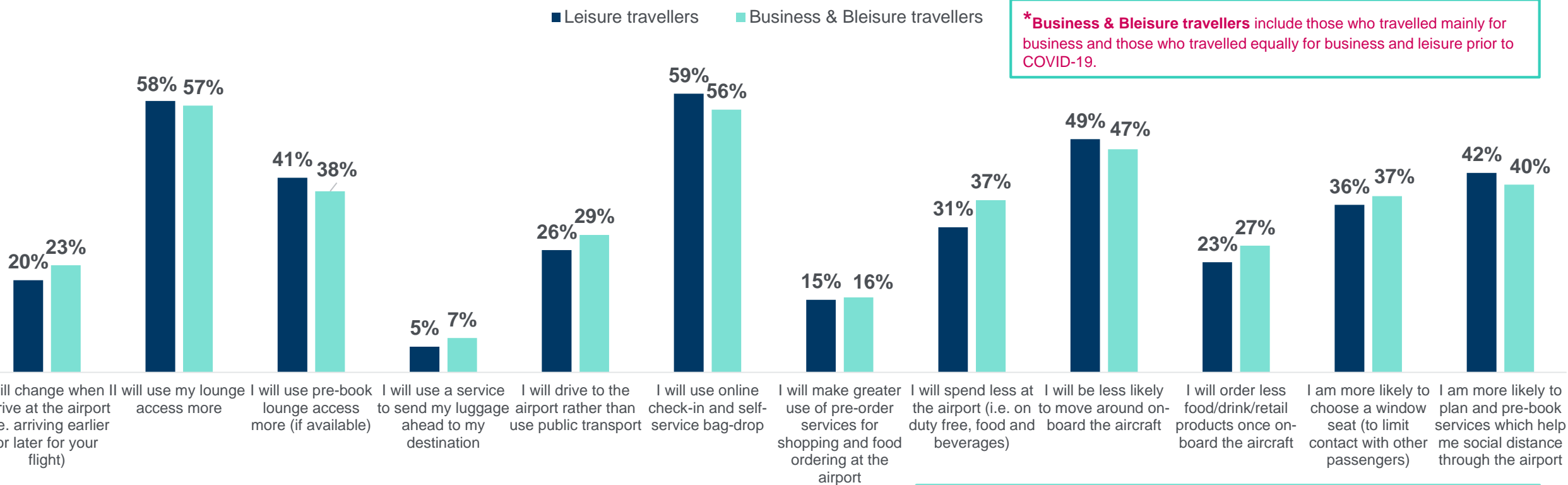
Unsurprisingly, the COVID-19 pandemic has impacted travellers to such an extent that some changes in the overall travel behaviour are expected. For example, almost three-fifths will use online check-in/self-service bag-drop and are planning to use their lounge access more than before. Also almost half of the respondents said they will be less likely to move around on-board the aircraft.



Changes In Air Travel Behaviour – Leisure vs Business & Bleisure Travellers

REF: Q8 – Thinking about the next time you travel by air, how do you think your behaviour will be different from previous journeys?; Q2 – What was the main reason for you traveling by air prior to the COVID-19 pandemic?

Similar changes in travel behaviour are expected from both leisure and business & bleisure travellers with small differences. For example, a higher number of business & bleisure travellers will spend less at the airport and will order less food, drinks and retail products once on-board the aircraft. However, a similar trend towards an increased use of the airport lounges is noticed among both groups of travellers.

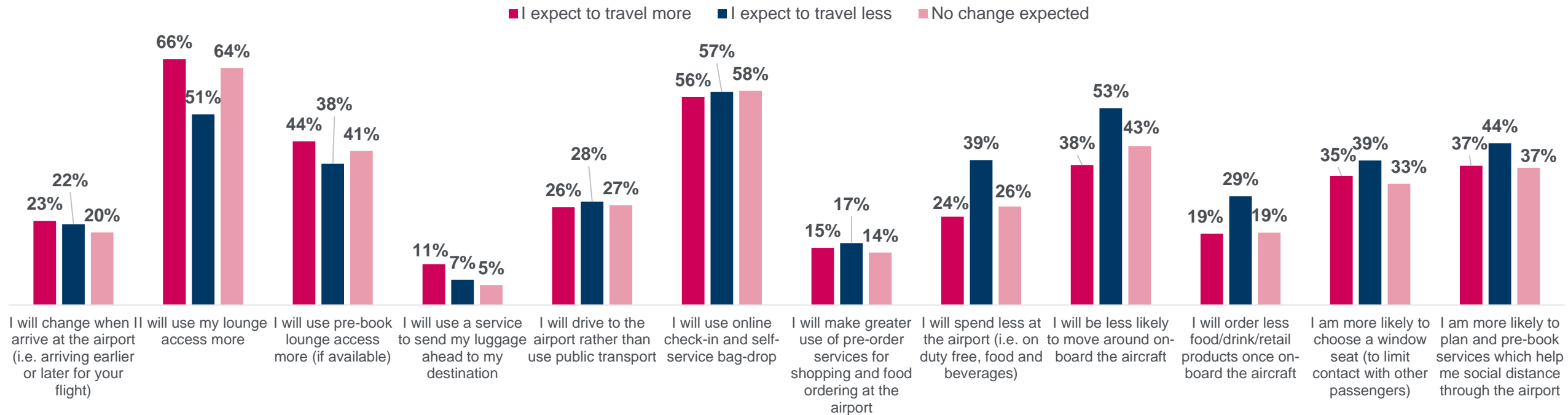


* **Business & Bleisure travellers** include those who travelled mainly for business and those who travelled equally for business and leisure prior to COVID-19.

Changes In Air Travel Behaviour – By Level Of COVID-19 Impact On Frequency Of Air Travel

REF: Q8 – Thinking about the next time you travel by air, how do you think your behaviour will be different from previous journeys?; Q3 – How do you see COVID-19 impacting your air travel plans going forward?

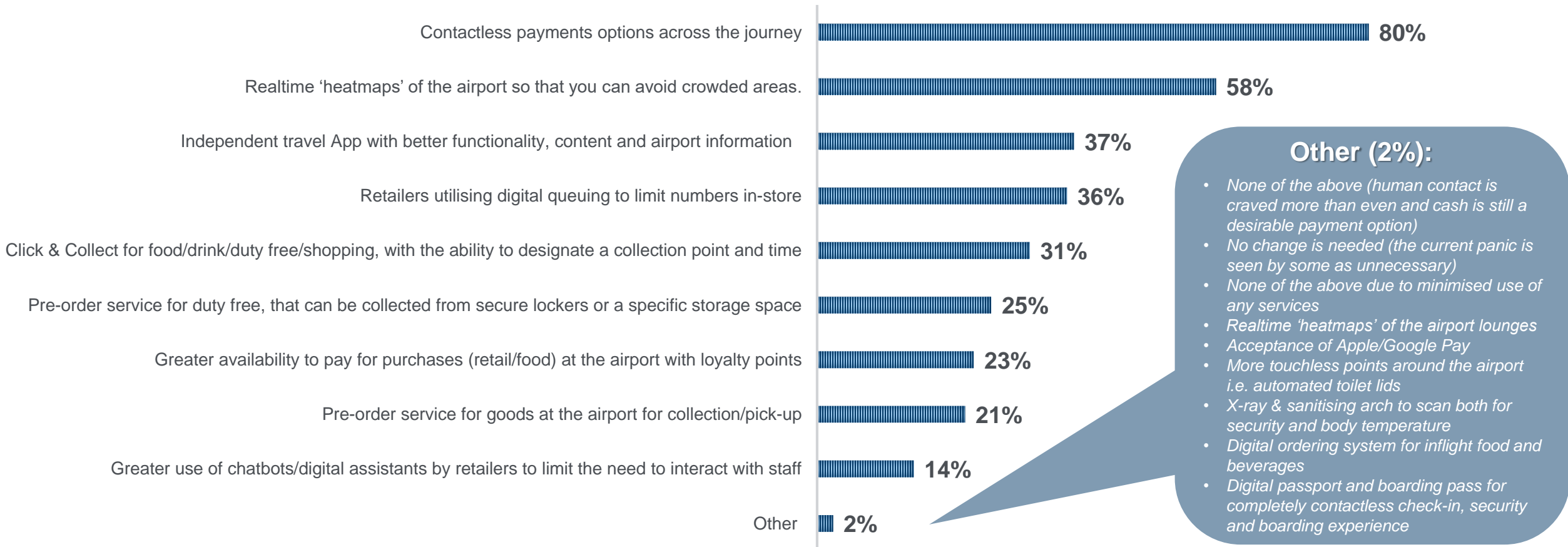
However, the expected changes in travel behaviour vary depending on the level of impact COVID-19 is likely to have on the frequency of air travel. For example, while around 65% of those, who expect to travel more or the same as before, said they will use their lounge access more, only 51% of those, who are expecting to travel less said the same. It should be noted that the sample of those who expect to travel more is much smaller than the sample of those who expect no change or expect to travel less.



Note: The percentages above do not add up to 100% since respondents were given the option to select a few responses (multiple choice question) – in this case they selected all the answers describing the way they think their travel behaviour will change in the future.

COVID-19 Effect On The Use Of Contactless Services

REF: Q9 – The prevalence of contactless services has increased as a result of COVID-19. Which of the following would you consider using or like to see the next time you travel by air.



Since the prevalence of contactless services has increased as a result of the virus, a large number of people would like to see contactless payment options across the whole journey as well as real-time heatmaps of the airport in order to avoid crowded areas the next time they travel by air.

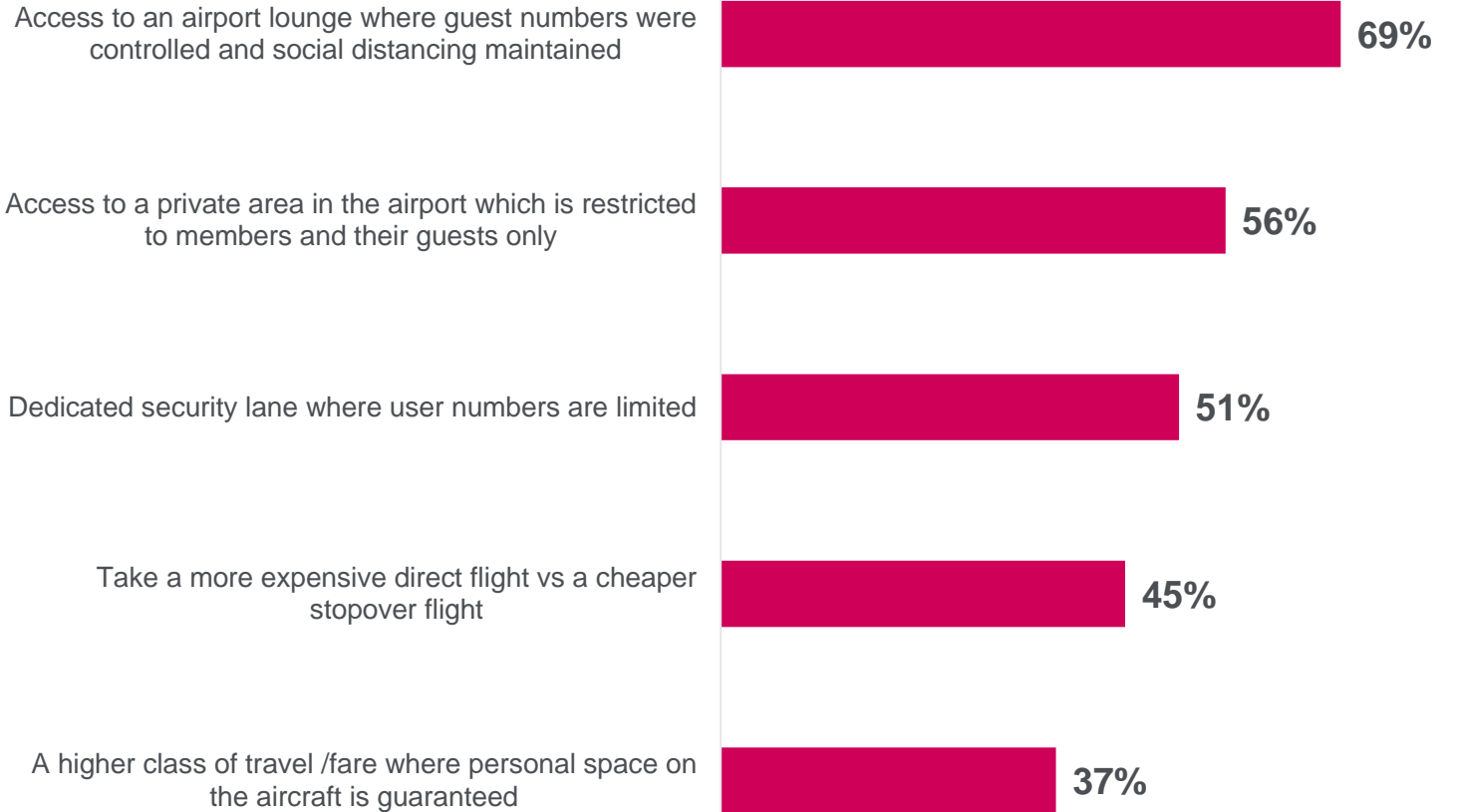
Importance Of Services That Reduce Interaction

REF: Q10 – Which of the following services at the airport or on the aircraft that helps reduce your interaction with other passengers would you be willing to pay for?

Since social distancing is taken very seriously as a potential measure that could restore confidence in future air travel, a lot of people are currently willing to pay extra for a number of different services that would limit their interaction with other passengers.

Almost 7 out of 10 said they would be willing to pay for access to an airport lounge where guest numbers were controlled and social distancing maintained. Also almost 6 in 10 would pay for access to a private area in the airport which is restricted to members and their guests only. These figures highlight the need for self-contained, private areas at the airport, making lounges a valuable service if guest numbers are handled well.

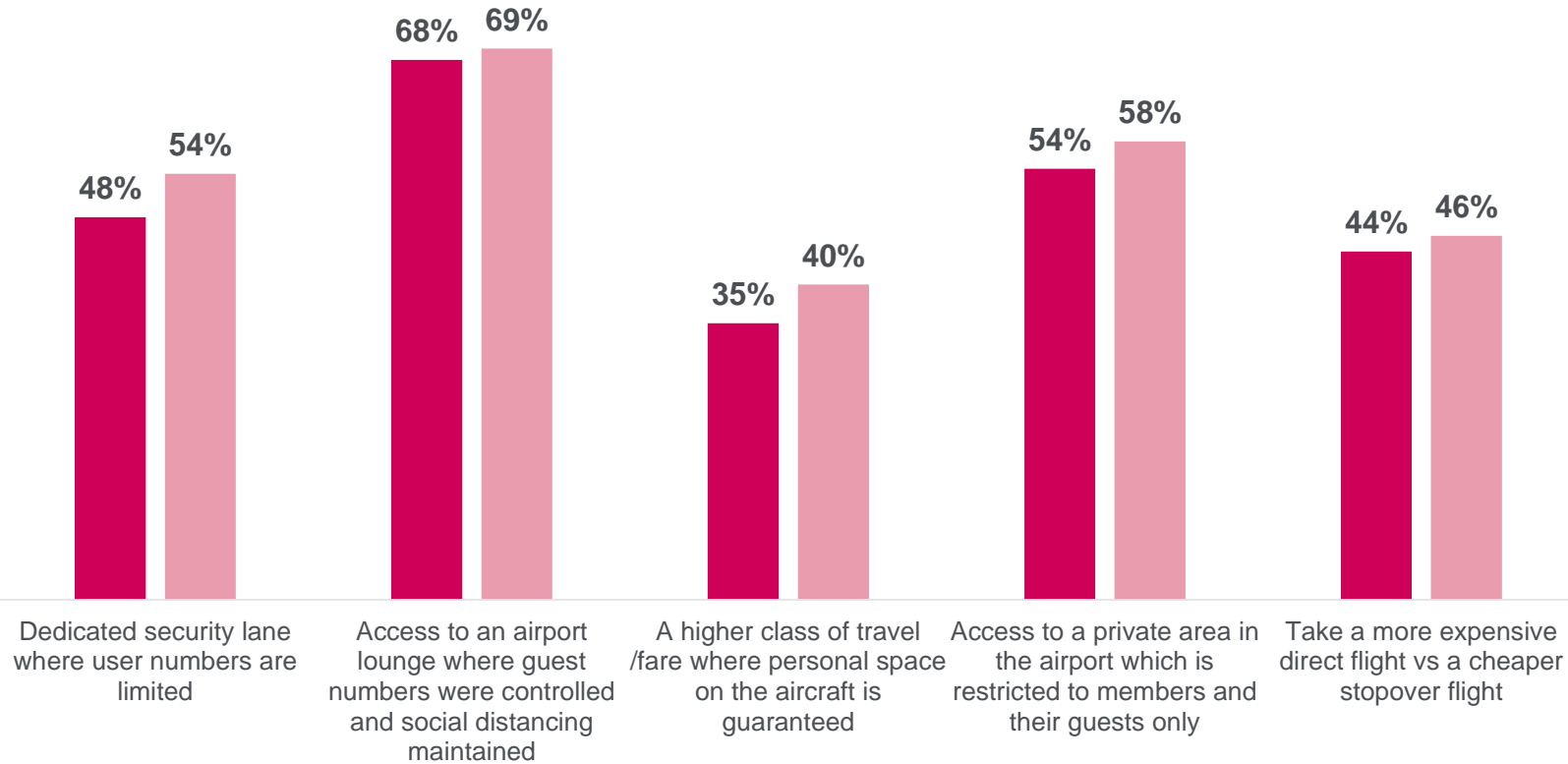
Additionally, just over half of the respondents said they would pay for dedicated security lane where user numbers are limited.



Importance Of Services That Reduce Interaction – Leisure vs Business & Bleisure Travellers

REF: Q10 – Which of the following services at the airport or on the aircraft that helps reduce your interaction with other passengers would you be willing to pay for?; Q2 – What was the main reason for you traveling by air prior to the COVID-19 pandemic?

■ Leisure travellers ■ Business & Bleisure travellers



***Business & Bleisure travellers** include those who travelled mainly for business and those who travelled equally for business and leisure prior to COVID-19.

When looking at leisure and business & bleisure travellers separately, it seems that business & bleisure travellers are generally more open to pay for services that will help them reduce the interaction with other passengers.

Post-COVID-19 Perception of Airport Lounges



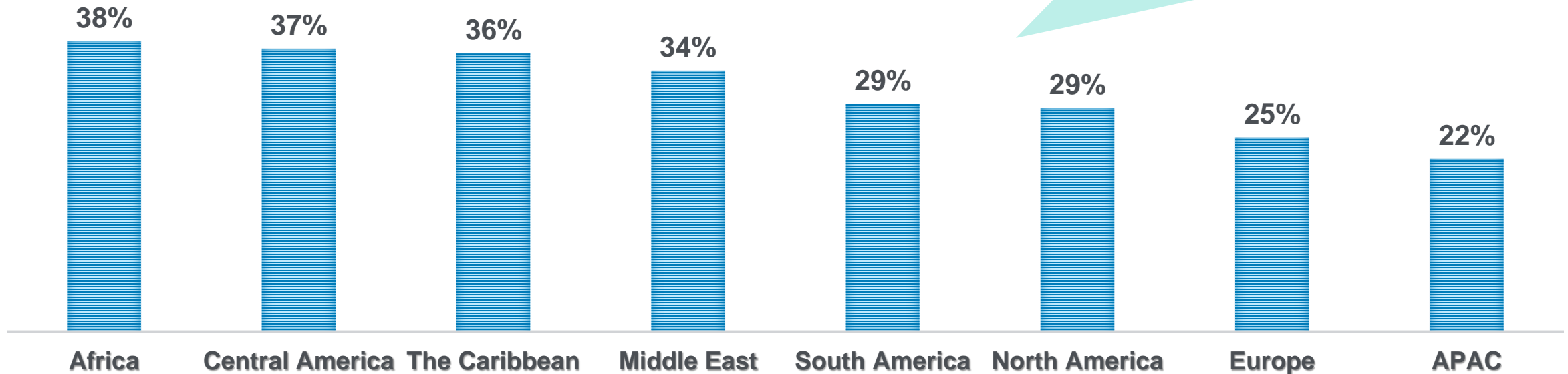
The Airport Lounge As An Aspect Of The Overall Journey

REF: Q4 – Thinking about your next trip by air and COVID-19, what specific aspects of the journey are you most concerned about?



As seen on slide 16, only 26% of respondents see the airport lounges as a concerning aspect of the overall journey. However, this perception of the lounge slightly changes by region – people in APAC and Europe are less concerned about the airport lounges (their figures are lower than the average of all regions together).

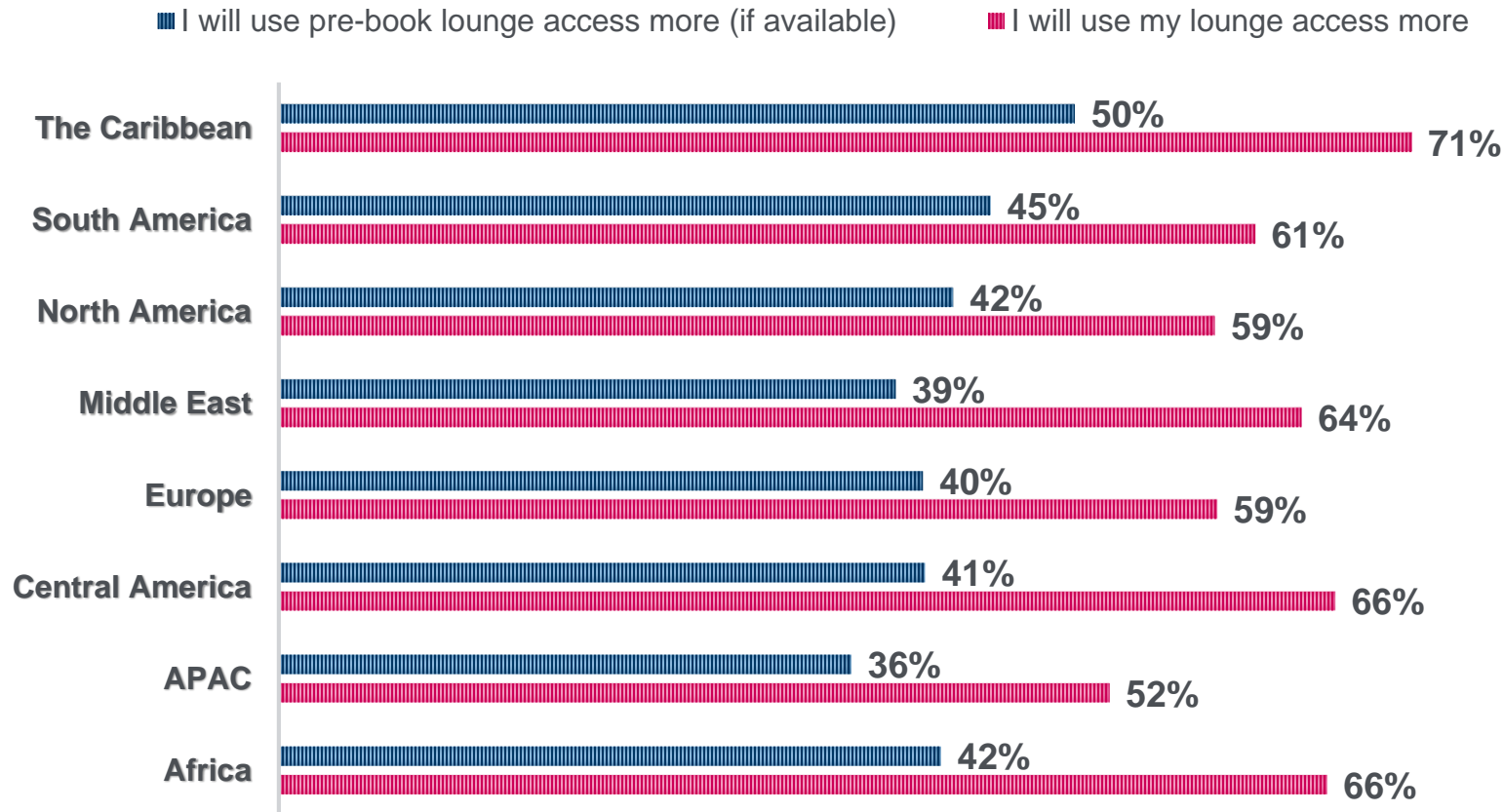
Thinking about my next trip by air and COVID-19, the airport lounges are some of the aspects of the journey I'm most concerned about.



Change In Behaviour Towards The Airport Lounge

REF: Q8 – Thinking about the next time you travel by air, how do you think your behaviour will be different from previous journeys?

Thinking about the next time I travel by air, I think...



In addition, when thinking about their next trip by air, almost 6 in 10 respondents stated they will use their lounge access more often and 4 in 10 said they will use pre-book lounge access more if available to them. Figures differ slightly depending on the region.

When looking at the regional comparison, it should be noted that although respondents in The Caribbean, Africa and Central America have the highest number of people who would use their lounge access more in their next trip, those regions have really small samples which can make their figures statistically insignificant when compared to the rest of the regions.

The Airport Lounge As a Paid Social Distancing Service

REF: Q10 – Which of the following services at the airport or on the aircraft that helps reduce your interaction with other passengers would you be willing to pay for?



The airport lounge is also seen as a service of high value when it comes to social distancing at the airport. On average, almost 7 out of 10 said they would be willing to pay for access to an airport lounge where guest numbers were controlled and social distancing maintained. While this is true for most parts of the world, the figures vary slightly across regions.

Although South Americans are the ones expecting to travel most, they seem to be also the ones least likely to pay for the airport lounges as a social-distancing service.

I would be willing to pay for access to an airport lounge where guest numbers were controlled and social distancing maintained, as a service at the airport that helps me reduce interaction with other passengers.

