VISITING A CULTURAL VENUE
SODEXO INVESTIGATES CONSUMER PERCEPTION OF THIS IN THE COVID-19 ENVIRONMENT

in partnership with
harris interactive

SPORTS & LEISURE
QUALITY OF LIFE SERVICES
At Sodexo, we are convinced that attending a live concert, a match, a conference or visiting a museum, are precious moments. They foster real social bonds between individuals. And real social bonds are essential for the health & wellbeing of everyone.

However, in a Covid-19 environment, is this still true?

How likely is it that people will visit a cultural venue again in the future (and when?)

This is why we commissioned a piece of primary research with Harris Interactive to understand perceptions of visiting cultural venues since the COVID-19 pandemic.

The survey was targeted to a nationally representative sample of people in four markets: the UK, USA, France and Spain and took place on October 7-8, 2020. A first wave of research was conducted in May-June 2020.

Sub-group analysis, between gender and age groups, has also been conducted. These results are shown where significant differences are seen.

**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:

### Between waves

<table>
<thead>
<tr>
<th>Example data:</th>
<th>Oct-20 (A)</th>
<th>June-20 (B)</th>
<th><em>(A)</em></th>
<th><em>(B)</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement 1</td>
<td>75%(B)</td>
<td>25%</td>
<td><strong>(A)</strong> June-20 data score significantly higher than Oct-20 data</td>
<td><strong>(B)</strong> Oct-20 data score significantly higher than Jun-20 data</td>
</tr>
<tr>
<td>Statement 2</td>
<td>25%</td>
<td>75%(A)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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:

### Gender groups

- *M*: Where **Males** score significantly higher than **Females**
- *F*: Where **Females** score significantly higher than **Males**

### Age groups

- **18-34s**: Where 18-34 year olds...
- **35-54s**: Where 35-54 year olds...
- **55s**: 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
The value of visiting a cultural destination: From June to October, we did not see a significant change in attitudes. The majority of people visit a cultural venue to learn, get inspired and to wind down.

We do see somewhat less enthusiasm for cultural destinations being an important aspect of human life in the UK and France. In the USA and France, there are now fewer respondents claiming they see them as a way to relax after a busy week whilst in the UK and Spain there are fewer respondents claiming they see them as an opportunity to socialize.

Level of comfort in visiting cultural venues
Somewhat, very and extremely comfortable combined scores

When we compare the research from June and October, we see interesting developments. Out of all of the countries surveyed, comfort levels are now significantly higher for the US, closely followed by France and Spain. In all three countries, about 70% of people are at least somewhat comfortable about visiting cultural venues as soon as they open again. The UK has stayed the same, which is not surprising given the recent introduction of further restrictions by the authorities.
When people feel comfortable again visiting a cultural venue

<table>
<thead>
<tr>
<th>Oct-20</th>
<th>June-20</th>
</tr>
</thead>
<tbody>
<tr>
<td>As soon as possible</td>
<td>18% (B)*M</td>
</tr>
<tr>
<td>In the next three months</td>
<td>19%<em>18.3%</em></td>
</tr>
<tr>
<td>In the next 6 months</td>
<td>26%</td>
</tr>
<tr>
<td>Within the year</td>
<td>18%</td>
</tr>
<tr>
<td>Would not feel comfortable until the current coronavirus outbreak is eradicated/ there is a vaccine</td>
<td>20% (B)*</td>
</tr>
</tbody>
</table>

Base: All who have visited 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)

Here we also see evidence of some interesting shifts between June and October. There has now been a significant increase in the proportion of people who would feel comfortable visiting a cultural venue again as soon as possible across all countries, especially in France, followed by Spain, the US and then the UK.

On the other hand, there has also been a significant increase of respondents saying they will wait for the outbreak to be eradicated or for a vaccine across all countries with the exception of the USA, suggesting a more positive outlook.

Of those who feel comfortable enough to visit - reasons why

<table>
<thead>
<tr>
<th>Oct-20</th>
<th>June-20</th>
</tr>
</thead>
<tbody>
<tr>
<td>I miss visiting cultural venues</td>
<td>51%</td>
</tr>
<tr>
<td>Visiting cultural venues helps my mental wellbeing</td>
<td>49%</td>
</tr>
<tr>
<td>Visiting cultural venues gets me out of the house</td>
<td>42%</td>
</tr>
<tr>
<td>I’m not worried about the Coronavirus when in a cultural venue</td>
<td>36%</td>
</tr>
<tr>
<td>Visiting cultural venues is an important aspect of my everyday life</td>
<td>31%</td>
</tr>
</tbody>
</table>

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)

For people who would feel comfortable enough to visit a cultural venue again, scores remain relatively consistent for June versus October. Around half state they miss visiting museums, tourist attractions, galleries, zoos and aquariums.

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 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)
How likely people are to purchase food and beverages at a cultural venue

Slightly more likely and much more likely combined scores

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

Factors that would make people more comfortable to visit

As with last time, all countries would like mandatory use of hand sanitizer at every entrance to cultural venues, along with a number of other aspects including proper social distancing guidance, staff wearing masks and gloves, and compulsory wearing of masks inside the venue.

What’s interesting is that some of these scores have seen a decrease since last wave, particularly in the USA, where we can clearly see a significant reduction across more than half the measures included in the study. This is not the case for the compulsory use of gloves, which has actually increased versus last time.

Finally, 1 in 10 respondents in the UK, USA and Spain stated none of the measures will make them more comfortable.
Key takeaways

WHY?
Attitudes remained consistent from our research in June and October. People feel that visiting cultural destinations is an essential aspect of human life. Up to three-quarters use them for inspiration, and they provide an opportunity to socialize for those who attend in the UK and US. Two-thirds in the UK, US and France use them to help wind down, rising to three-quarters of Spanish people.

HOW LIKELY?
Most people do feel at least somewhat comfortable in wanting to attend cultural venues. When compared with June, comfort levels are now significantly higher for the US, France and Spain.

WHEN?
We see some interesting shifts from June to October. There is a significant increase in the proportion of people who would feel comfortable visiting a cultural venue again as soon as possible across all countries, especially in France, followed by Spain, the US and then the UK.

On the other hand, there has also been a significant increase of respondents saying they will wait for the outbreak to be eradicated or for a vaccine across all countries with the exception of the USA, suggesting a more positive outlook.

HOW?
People would feel more comfortable visiting cultural venues if certain factors were adhered to: mandatory use of hand sanitizers at every entrance to venues, proper social distancing guidance, staff wearing masks and gloves, and compulsory wearing of masks inside the venue. Interestingly, overall scores for the different measures have decreased, particularly in the United States where there is a significant reduction across more than half the measures included in the study. Still one in ten respondents in the UK, USA and Spain stated none of the measures would make them more comfortable.