



beyond

Beyond Report Lounges 2024

Dive deep into
Passenger Insights
of Lounge Services
in Europe

Learn Faster Understand More Act Sooner

Transforming social data into actionable initiatives - our social sentiment analysis guides you through successful change.

Identify

Reveal the performance of services, locations or markets combining vast social sentiment data sets and surfaced verbatim extracts to contextualise findings.

Act

Tactically Deploy new targeted offerings, staff training or engagement initiatives to the areas that need it most quickly.

Strategically Change the trajectory of your product offering, benchmark against your competitors and create a roadmap for the future.

Track

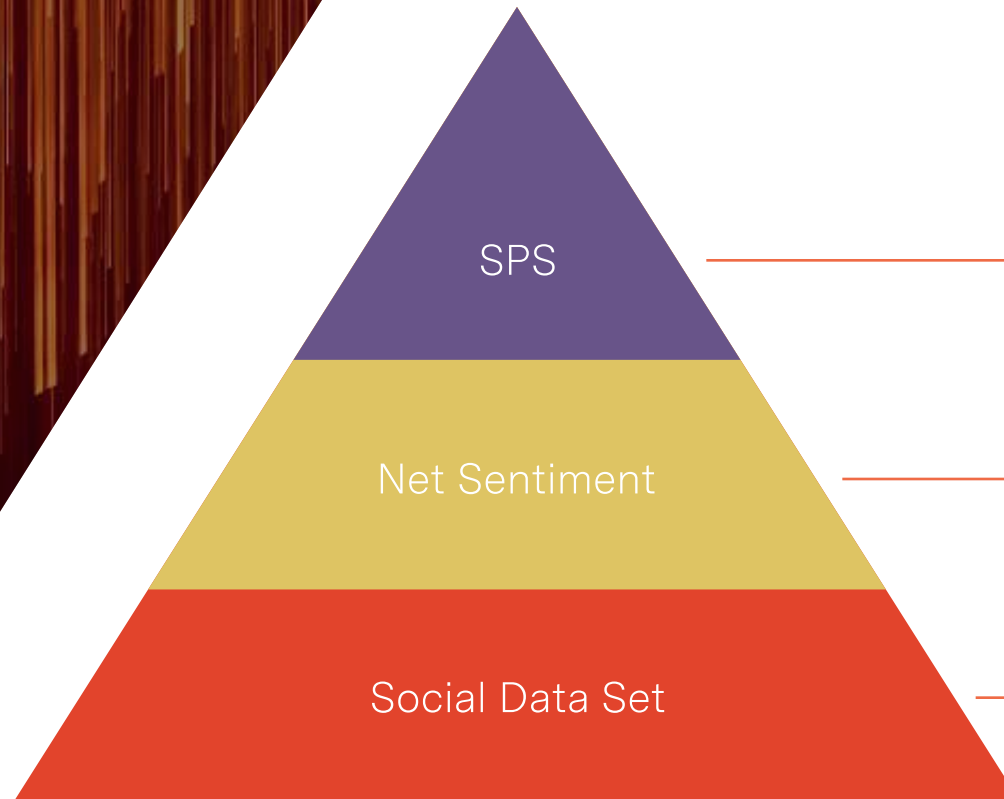
Through monitoring, reporting and further analysis - gauge the success of your actions much faster than traditional customer feedback methodologies.

Vast Data Refined Approach Disruptive Experience

We endeavour to ensure all insights we deliver are relevant, impactful and digestible by all in your organisation.

Social Promoter Score (SPS) has proven to derive insights which are corroborated by traditional methods such as NPS.

SPS delivers performance tracking faster, more regularly, and accurately - based on the true thoughts and feeling of your customers.



For your people managers and front of house teams an easily understandable 'at-a-glance' **Social Promotor Score** metric to manage performance, identify problem areas, and celebrate excellence.

We quantify and analyse the data to provide organisations with performance metrics at various levels of granularity.

Our social dataset is vast, containing millions of data points from social media, review sites and forums.

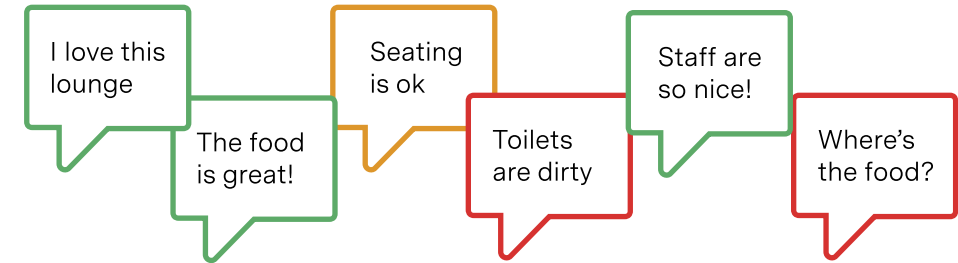
SPS: How it works

SPS utilises internet reviews as it's basis, offering analyses at regional, airport, or lounge levels and delving into specific passenger expectation areas (Pillars).

No surveys are needed; we can compare competitors and expansion targets against your performance.

Presented on a scale of 0 to 100, SPS aligns with Net Promoter Score for easy comparison.

- 1 Reviews from across online sites are gathered, no personal data is retained.



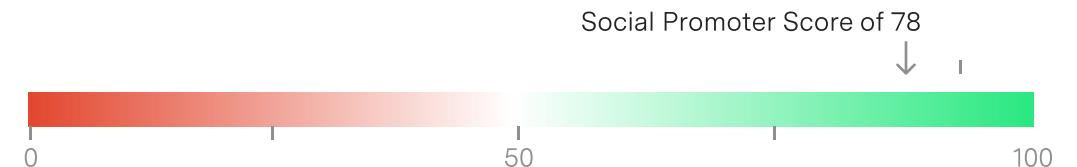
- 2 The total number of reviews according to sentiment are used to calculate the passenger 'Net Sentiment'

$$\frac{(\text{pos}-\text{neg})}{(\text{pos}+\text{neu}+\text{neg})} \times 100 = \text{Passenger Net Sentiment}$$

- 3 Net sentiment can then be processed further to deliver on a scale with equivalence to traditional NPS

$$\frac{\text{Passenger Net Sentiment} + 100}{2} = \text{Social Promoter Score}$$

- 4 Social Promoter Score range is from 0 to 100



Lounge Experience Report in numbers

For this report, we're taking a broad look at the European lounge market for 2023. We analysed online conversations to gauge passenger sentiment across our 13 service areas.

This year's edition of the Lounge Experience Report gives insight into how lounges in Europe are coping with rising passenger traffic. Some passengers expect the same service levels as in previous years. Others, new to lounges, seek a quiet space away from crowded airport terminals.

Key Themes that drive your customers' engagement

- *Essentials*
- *Comfort*
- *Food & Beverage*
- *Amenities*

13 pillars of expectation

Differentiated offerings

- *Airline branded lounges*
- *Lounge networks*
- *Credit Card affiliated lounges*
- *Local airport lounges*

4

Themes

13

Pillars

200+

Lounges

32,706

Visitor Reviews

METHODOLOGY OVERVIEW

13 Pillars of Expectation

The basis of our expertise on Airport Lounges comes from online conversations which we analyse by theme, looking at both Volume and Social Promoter Score.

This results in 13 key topics, seen here on the right.














They further sorted into 4 higher order groups:

Essentials

Comfort

Food & Beverage

Amenities

	Lounge Location	Is it easy to find or too far away from the gate?
	Lounge Access	Are guests turned away or left outside to queue?
	Staff Service	Are the staff friendly or rude, helpful or hiding?
	Hygiene	How clean are the seats or toilets? Are dirty plates being cleared?
	Ambience	Does the lounge have a wow factor? Is it a calm or relaxing space?
	Seating	Are there enough seats? Are they comfortable?
	Crowding	Is the lounge overcrowded? Quiet or Noisy?
	Food Quality	Is the food tasty? Is there enough range? Does it get refreshed often?
	Drinks Service	Is the range of drinks good enough? Is there a bartender or mixologist?
	WC/Showers	What are the passenger perceptions of essential facilities?
	Charging Outlets	Are there enough? Do they work?
	Wi-Fi/Connectivity	Is sign-in arduous? Is it fast and stable enough?
	Other Services	What are the perks of the lounge, from prayer rooms to pool tables?

Top Reviewed Lounge Types in Europe

Airline Branded

42% of tracked lounges

Air France Lounge 2E - Hall L, Paris
KLM Crown Lounge 52 (Intercontinental), Amsterdam
Lufthansa Business Lounge A13 (Schengen), Frankfurt
KLM Crown Lounge 25 (Schengen), Amsterdam
TAP Premium Lounge, Lisbon
SAS Gold Lounge, Copenhagen
Iberia Velázquez Lounge, Madrid
Lufthansa Senator Lounge B (Non-Schengen), Frankfurt
SAS Gold Lounge, Stockholm
Lufthansa Business Lounge A26 (Schengen), Frankfurt

Lounge Networks

28% of tracked lounges

Club Aspire Lounge Terminal 5, London
Escape Lounge, London
Escape Lounge T3, Manchester
Escape Lounge T2, Manchester
Neptuno VIP Lounge, Madrid
Escape Lounge T1, Manchester
Sala VIP Cibeles, Madrid
Escape Lounge, Bristol
Club Aspire Lounge Terminal 3, London
No1 Lounge North Terminal, London

Local Lounges

28% of tracked lounges

Terminal 1 Lounge, Dublin
Lounge ANA, Lisbon
LuxxLounge, Frankfurt
Marco Polo Club Lounge, Venice
Vienna Lounge, Vienna
Sky Lounge terminal 3, Vienna
1903 Lounge, Bristol
Extime Lounge - Terminal 2B / 2D CDG, Paris
UpperDeck Lounge, Glasgow
Goldair Handling Intra Schengen Lounge, Athens

Credit Card Affiliated

2% of tracked lounges

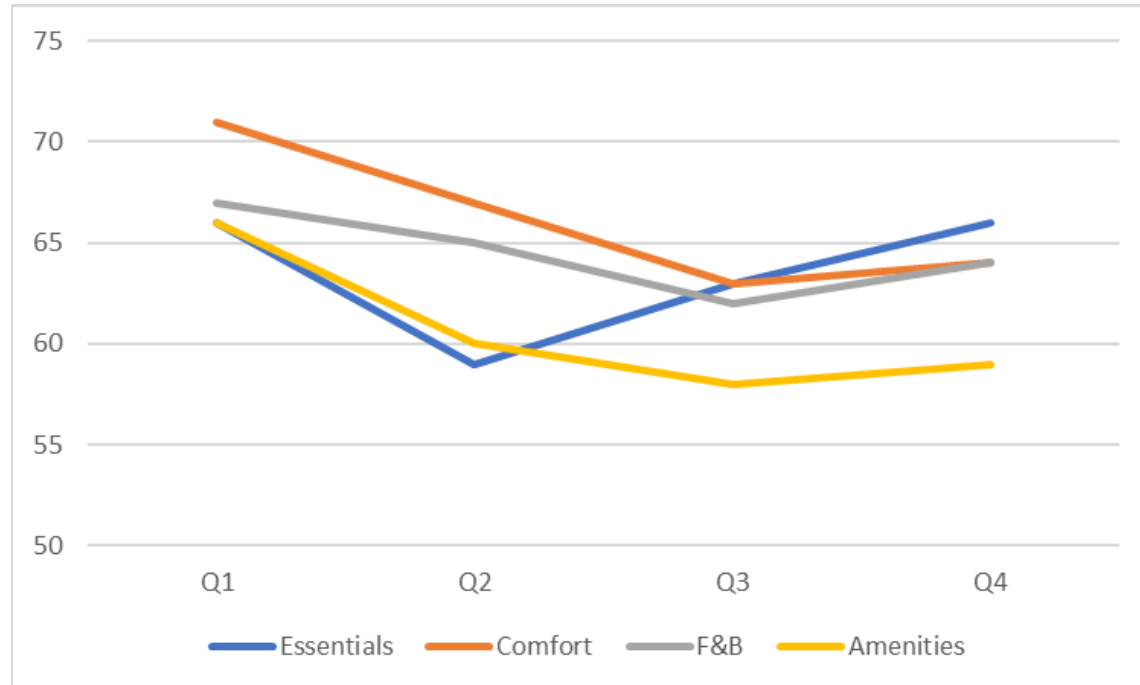
American Express Centurion Lounge, London
ERSTE Premier Lounge, Prague
MasterCard Lounge, Prague
MasterCard Airport Lounge, Budapest
Mastercard Caproni Lounge, Bratislava

All Lounges

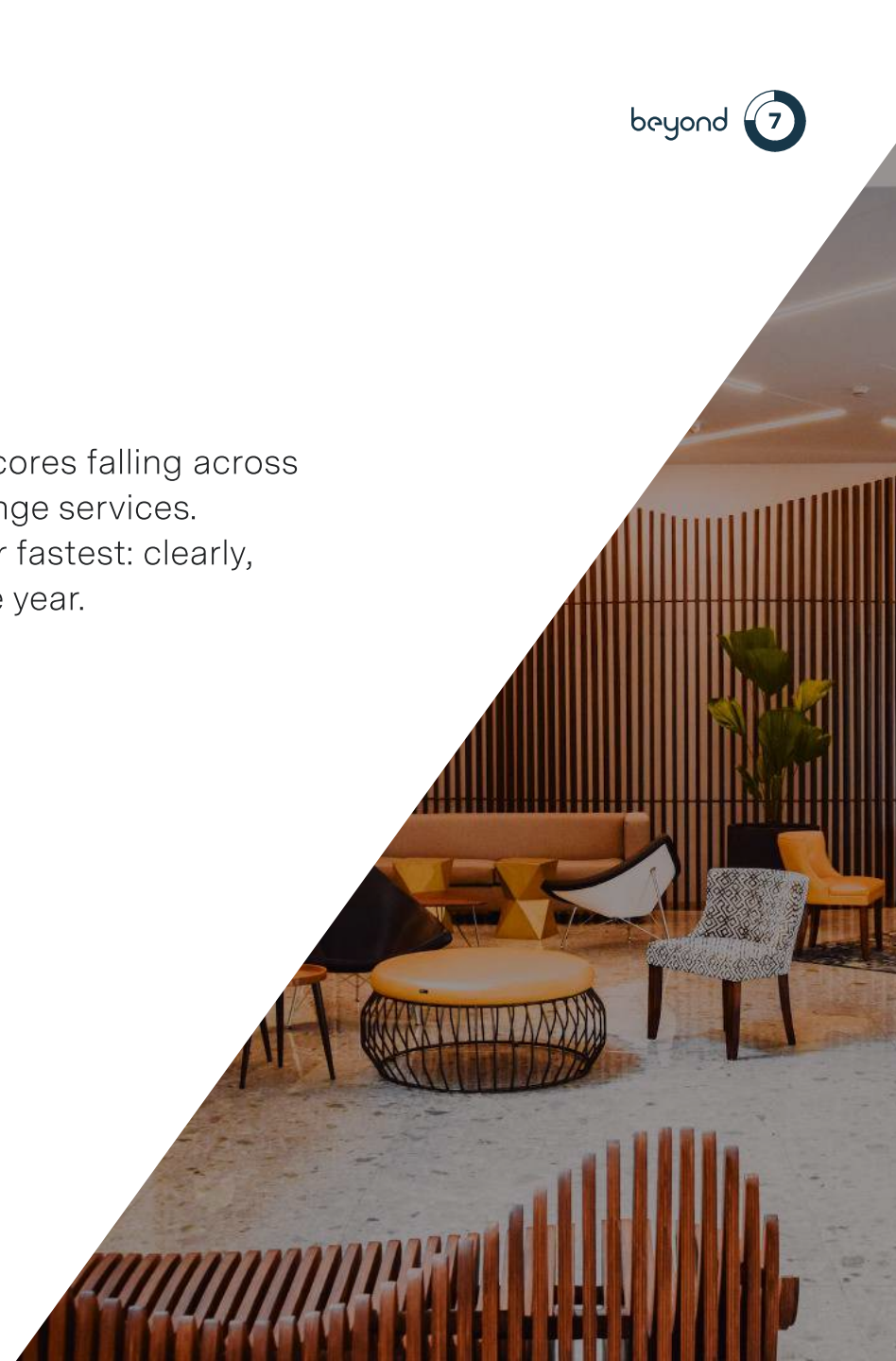
SPS Performance across the group

Passenger Sentiment Continue to Suffer in 2023

Right as travel intensity picked up in H2 we are seeing overall lounge Social Promoter Scores falling across all four themes. Passengers are clearly experiencing and expressing frustration with lounge services. Interestingly, Essentials experience the highest immediate drop, but also start to recover fastest: clearly, lounge operators are working hard to resolve capacity and quality issues throughout the year.



Social Promoter Score
European Lounges
Q1 to Q4 2023



All Lounges

SPS Performance across the group

Pillars with Highest Engagement

The largest contributing factors to overall sentiment

The top three Pillars by volume and therefore representative of the most important expectation of passengers are:

- Food Quality & Service
- Staff Service
- Ambience

Crowding is a continuous issue for all airport lounge types.

Our Insight

Though your customers' food and beverage expectations are driving the online conversation, crowding is becoming a key detractor - our data shows that hygiene, staff service, ambience and access to amenities are all somewhat caused by, and feed into, a sense of 'overcrowdedness' that is tainting customer experience.



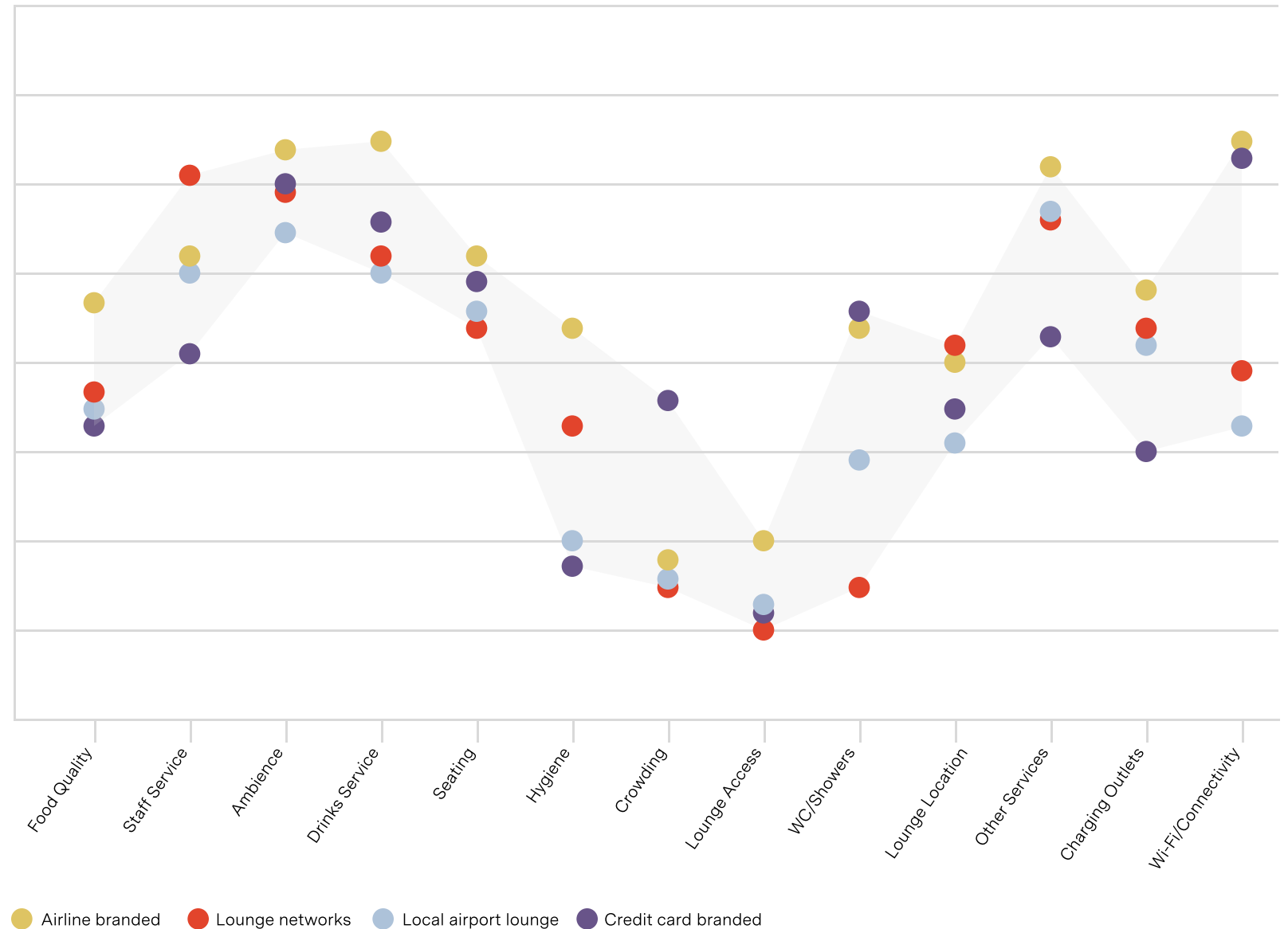
HIGH-LEVEL FINDINGS

Performance Overview

The chart shows Social Promoter Score by lounge type across the 13 pillars of passenger expectation.

The pillars are ordered by Passenger Importance with **Food Quality** having the highest volume of comments and **Wi-Fi/Connectivity** the fewest.

Lounge Access and **Crowding** are clear pain points for passengers across all lounge types.



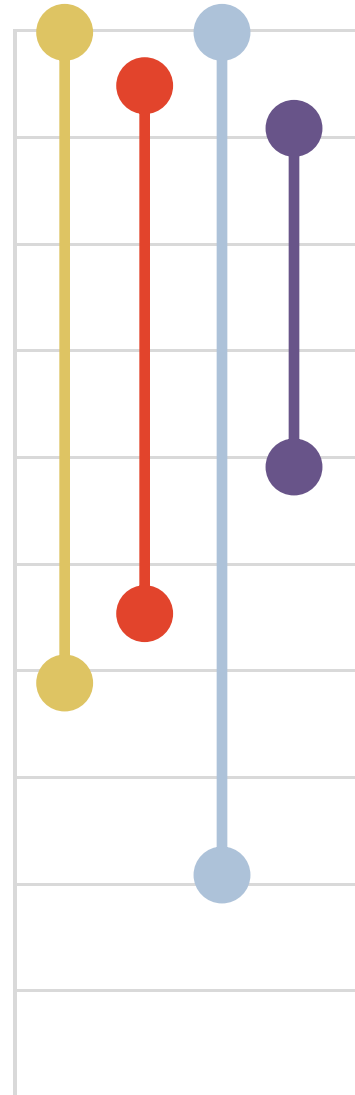
HIGH-LEVEL FINDINGS

Sentiment Highlights

This section covers each pillar in detail, highlighting key trends and representative voice of customer mentions.

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Lounge Performance Ranges

SPS score ranges for lounges with top 90% volume of conversations

For the 5 pillars driving the highest volume of conversations, we are including the SPS range indications for each lounge type:

- Airline branded
- Lounge networks
- Local airport lounges
- Credit card branded lounges

These indicators display anonymized SPS scores representing the highest performing lounge within each lounge type and pillar, as well as the lowest score within the range.

Despite the challenges faced by lounges in 2023, top-performing lounges continue to receive high praise from guests across all pillars. Conversely, others struggle to meet expectations, with scores often falling below 20, particularly in areas such as Food Quality and Drinks Service, resulting in predominantly negative sentiment.

● Airline branded ● Lounge networks ● Local airport lounge ● Credit card branded

The Lounge Experience Report

The Lounge Experience Report is available now and highlights the issues even the top lounges are experiencing as traveller demand returns rapidly, but staff shortages make delivering the quality of service expected difficult. We cover some of the high-level findings here, for the in-depth report, please get in touch.

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