

## Leisure Review: Inc Impact of COVID-19 - UK - December 2020

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“2020 has been a very difficult year for the UK leisure market. The uncertain economic climate will continue to pose a threat to discretionary spending once restrictions are lifted following yet another lockdown in early 2021, while fear of catching the virus will continue to feed feelings of discomfort in visiting out-of-home venues.”

– **Lauren Ryan, Leisure and Travel Analyst**

This report looks at the following areas:

- The impact of COVID-19 on the UK leisure market and consumer behaviour.
- Participation in out-of-home leisure activities since venues reopened.
- Most missed features of leisure venues when closed.
- Attitudes towards emerging brand innovations, such as at-home experiences and outdoor concepts.

Leisure venues' role as a 'third place' has been much missed by consumers during their closure due to COVID-19. 64% of those who have taken part in any out-of-home leisure activity since the start of the pandemic say they missed being able to socialise at these venues, while 47% missed having a change of scenery.

Consumers are now deprived of these things once again as new lockdown measures have come into force in early January 2021. With the government warning that the eventual easing of the lockdown is likely to be a gradual one, out-of-home leisure operators such as restaurants, pubs and live entertainment organisers will be heavily restricted and under immense pressure during the first half of 2021.

Even once restrictions are relaxed, the uncertain economic climate and the risk of high unemployment pose further threats to operators as people will show caution when making discretionary purchases. Although pent-up demand for in-person visceral experiences will drive consumers to live music concerts and festivals, theatres, gyms and restaurants, digital access will also remain in the longer term. The future of leisure will be a hybrid of online and offline experiences that seamlessly bridge the gap between in-person attendance and consumption at home.

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Reaching consumers at home

'Third places' critical to communities

## The Market – Key Takeaways

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Sectors that rely on mass gatherings worst hit in 2020

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Gyms and leisure centres

Sports participation

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Online gaming and retail gambling  
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Home delivery and takeaway  
Eating out

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Peloton releases updated home bike  
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Dice.fm prioritises livestreaming  
Old Vic stages livestreamed events  
RHS Chelsea Flower Show reaches international audience  
Outdoors  
Restaurants and pubs invest in outdoor dining

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