

Leisure Industry Overview - UK - December 2009

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What is this report about?

The UK out-of-home leisure industry has enjoyed a period of steady growth during the past two decades but this came to a halt in 2009 with the first downturn in spending since the last major recession in the early 1990s. Nonetheless, leisure remains a huge area of consumer spending, valued at almost £70 billion in 2009.

This report provides an overview of the UK leisure industry, in terms of overall spending trends and the performance of individual sectors, as well as providing an insight into the UK leisure consumer, in terms of behaviour, response to the recession and attitudes and opinions.

What have we found out?

- The recession and higher prices caused by rocketing overheads have both contributed to a second successive year of declining leisure spending. In 2009, the leisure industry will be worth approaching £70 billion, a 9% increase over 2004 but 1.5% lower than in 2008.
- The best-performing area of the industry during the past five years has been cultural leisure such as music concerts and festivals (+64.3%), theatre (+27.7%) and museums (+15.6%).
- Music concerts and festivals (+8.3%) has shown the strongest growth in the past year while, benefiting from strong inbound tourism, theatre (+4.2%) also performed well, as did museums and galleries (+4%).
- Eating out and drinking in pubs and bars – which together account for 70% of total leisure spend – have been experiencing contrasting fortunes during the past five years. Eating out (+16.6% by value) has seen growth (albeit with a greater focus on value since the recession began) whereas pub/bar drinking (-2.8%) is on the wane as the sector reels from the 'double-whammy' of the smoking ban and competition from cut-price supermarket alcohol.
- Drinking in pubs/bars and eating out (43% and 40% of adults respectively) are where people are most likely to have made cutbacks already, along with clubbing, cinema and traditional gaming such as betting and bingo.
- Looking forward, non-Lottery gaming looks set to bear the brunt of future spending reductions, along with visits to theme parks, clubbing and health club memberships.

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