In- vs Out-of-town Leisure - UK - November 2009

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What is this report about?

This report considers all sides of the in- versus out-of-town leisure debate, from the point of view of planners, developers, operators and consumers, and provides some pointers as to the likely future development of leisure in these two very different but competing locations.

What have we found out?

- Out-of-town leisure complexes are seen by consumers as a convenient, safe environment for responsible people to enjoy and reward themselves and this is something they could seek to capitalise on a bit more than they currently do. Ease of parking is the primary attraction of them for four out of ten consumers. A quarter like these complexes because of their good choice of venues.
- Proximity and accessibility are the key drivers of the city/town centre market. Approaching a third like being able to visit several different places in the same day/evening while more than a quarter like the fact they can get there easily on foot and by public transport.
- Planning policy has driven the focus of leisure development firmly into town centres. The consequences are two-speed development with expansion of some market sectors like restaurants and bars continuing apace, to the detriment of sectors such as large-footprint health and fitness and tenpin bowling operations, less suited to such locations.
- The recession has slowed the pace of leisure developments to a trickle. Once the schemes currently being built are completed, new developments are expected to virtually dry up until investor, potential tenant and consumer confidence all recover.
- Food, drink and cinema are the major drivers of the in- and out-of-town leisure markets. Nearly 41 million adults (81%) have eaten out in a restaurant or pub at an out-of-town leisure complex in the past year while almost 40 million (79%) have done so in city/town centre restaurants.
- The importance of drinks sales is underlined by the fact that 36 million adults (71%) have had a drink in city/town centre pubs/bars, while almost as many (69%) have done so at a pub/bar in an out-of-town complex. Cinema is the other major driver of footfall, with nearly 29 million people (57% of adults) visiting a city/town centre cinema in the past year and over 33 million (66%) going to see a film out-of-town.

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