

In vs Out-of-home Leisure - UK - April 2021

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This report looks at the following areas:

- The impact of COVID-19 on the UK leisure market and consumer behaviour
- Participation in in- and out-of-home leisure activities prior to and following the outbreak of COVID-19
- Innovations of brands and companies operating in the in- and out-of-home leisure markets
- Future consumer behaviours relating to in- and out-of-home leisure
- Consumer attitudes towards in- versus out-of-home leisure

25% of consumers agree that "online socialising and entertainment can be just as enjoyable as in-person social and entertainment activities", compared to 39% who disagree. For younger generations, the percentage who agree is markedly higher, with 37% of 16-24 year olds agreeing as opposed to 8% of over-65s. The popularity of online entertainment with younger generations indicates that some of the digital innovations seen in leisure since the coronavirus outbreak could be here to stay longer-term.

COVID-19 has decimated the out-of-home leisure industry through the enforced shutdown of large swathes of the sector. 2021 has the potential to unleash a wave of pent-up demand from which many leisure activities will be a beneficiary. Digital services that have sprung up during lockdown can have a lasting impact on the in-home sector, with some consumers even potentially forgoing a return to real world equivalents, such as continuing to do virtual work-out classes over returning to gyms.

A lot of out-of-home leisure events, such as music festivals, are largely at the mercy of how the pandemic unfolds. Should such events go ahead, a requirement to test all audience members, or for all attendees to be vaccinated, can present significant logistical challenges. Outside of mass events, residual concerns about returning to indoor settings, such as theatres and cinemas, vaccinated or not, after a year of conditioning to avoid such places can hamper recovery.



"The out-of-home leisure market has the potential to rebound strongly in 2021, with the vaccination programme driving consumer confidence to return to indoor settings.

There is set to be a release of pent-up demand, with a celebratory feel, as consumers make up for lost time and missed social occasions."

– Joe Birch, Technology Analyst

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Despite some reticence surrounding the out-of-home sector, enough pent-up demand should create the potential for a celebratory feel in the summer 2021 months, as families and friends re-unite and make up for missed occasions. Furthermore, significant groundwork for direct-to-consumer experiences over the past year looks set to create an enduring market for the in-home leisure sector, from premium Michelin-starred meal kits to digital fitness propositions. In-home activities have never been so flexible and varied, which can sustain a healthy parallel market after the pandemic has subsided.



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