

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Innovation within the leisure industry is dominated by technological developments, especially the use of apps to aid venue and menu discovery, driving footfall, the making of reservations, pre-ordering and payment. Reducing queues, speeding up payment and making payment cashless are key elements of these developments."—

Michael Oliver, Senior Leisure & Media Analyst

This report looks at the following areas:

- Sharing economy offers opportunities for leisure operators
- · Trend of automation can benefit businesses and consumers
- · Crowdsourcing enables stronger engagement with leisure customers

The UK leisure market has continued to grow during 2014, increasing in value by 2.9%. Although much of this growth is attributable to inflation, there have been the first signs of benefits from improving consumer confidence and falling unemployment, although consumers' disposable incomes are still under considerable pressure after years of decline and have only recently started to increase again.

This report looks at trends in the leisure industry, as well as the factors that are driving these trends and also examines innovations, particularly in the key area of technology. Additionally, it provides extensive consumer research into participation in leisure activities, days of the week when people do each activity, how far in advance people book, how consumers find out about leisure venue promotions, what they intend to spend any extra money on, and general attitudes towards leisure.

BUY THIS <u>REPORT</u> NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definitions

Abbreviations

Executive Summary

The market

Figure 1: Value of the UK leisure industry*, 2009-19

Market drivers

Figure 2: Smartphone and tablet ownership and purchase/upgrade intentions, June 2014

Innovation

The consumer

Leisure activity participation

Figure 3: When leisure activities last done, August/September 2014

Which days of the week are leisure activities done?

Figure 4: leisure activities done by days of week, August/September 2014

How far in advance do people book leisure activities?

Figure 5: How far in advance people book leisure activities, August/September 2014

How people find out about deals and events

Figure 6: How people find out about special deals and events promoted by leisure venues, August/September 2014

Which sectors could benefit from improved disposable income?

Figure 7: Leisure activities people would spend more on if they had more money (all mentions), August/September 2014

Attitudes towards leisure activities

Figure 8: Attitudes towards leisure activities, August/September 2014

What we think

Issues and Insights

Sharing economy offers opportunities for leisure operators

The facts

The implications

Trend of automation can benefit businesses and consumers

The facts

The implications

Crowdsourcing enables stronger engagement with leisure customers

The facts

The implications

Trend Application

Trend: Click and Connect
Trend: Life Hacking



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Trend: Futures: Access Anything, Anywhere

Market Drivers

Key points

Pressure on overheads begins to ease

Catering prices growing more slowly

Figure 9: Trends in CPI and catering services price inflation, 2009-14

Gas prices grow well ahead of inflation

Figure 10: Trends in utility prices* paid by non-domestic consumers, 2009-14

CRC scheme keeps pressure on operators to reduce emissions

Figure 11: Trends in CO2 emissions of selected leading leisure operators, 2011/12-2012/13

Fuel costs increase distribution overheads

Figure 12: Trends in the price of petrol and diesel, 2009-14

Staff cost increases subdued over the past five years

Figure 13: National Minimum Wage hourly rates, UK, compared to the Retail Price Index, 2008-14

Weather

Figure 14: Trends in UK weather, 2009-14

Figure 15: Trends in UK sunshine, by month, 2009-14

Figure 16: Trends in UK rainfall, by month, 2009-14

Finance, mergers and acquisitions

Greene King seeks to boost quality of its estate

Budget gym merger is scuppered by competition investigation

Further issues for private equity investors

Legislation

Parliament votes to break the pub tie for tenants

Late-night levy gathers steam

The UK economy

OBR GDP forecasts paint buoyant picture

Figure 17: Forecast for UK GDP growth, 2013-18, December 2014

Income squeeze has continued to affect leisure markets in 2014

Figure 18: Trends in inflation and average weekly earnings, January 2009-August 2014

Unemployment falls sharply

Figure 19: Trends in UK unemployment rate, Q1 2009-Q3 2014

Youth unemployment still a worry but has fallen

Figure 20: Trends in UK unemployment rates* (seasonally adjusted), by age group, 2009-14

Consumer confidence recovers at last

Figure 21: Trends in UK consumer confidence, January 2009-October 2014

Device ownership opens up multitude of opportunities

Figure 22: Household/personal ownership of consumer technology products, June 2013 and June 2014

Smartphones, laptops and tablets high up the list of purchasing intentions

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 23: Technology products plan to buy/upgrade in next three months, June 2014

Who's Innovating?

Key points

Technology transforms the leisure landscape

Pre-ordering and booking

Payment apps

Venue and menu discovery

Driving footfall

Pay as you like

Push marketing

Using crowdsourcing to provide a more immersive experience

Alternatives to paying with cash

Extending the reach of out-of-home entertainment

Market Size and Forecast

Key points

UK leisure industry shows modest growth

Figure 24: Value of the UK leisure industry*, 2009-19

Forecast

Figure 25: Forecast UK leisure* industry market value, 2009-19

Segment Performance

Key points

Gambling growth drives market forward

Figure 26: Value of the UK leisure industry*, by segment, 2009-14

Figure 27: Value of the UK leisure industry*, by segment, 2014

The winners and losers: long term

Figure 28: Value growth rates for leisure industry* sectors, 2009-14

The winners and losers: short term

Figure 29: Value growth rates for leisure industry* sectors, 2013-14

Leisure Activity Participation

Key points

A nation of gamblers

Figure 30: Leisure activities participated in and frequency of participation, August/September 2014

Eating and drinking are most popular activities in past month

Figure 31: Top ten leisure activities in the past month and the past 12 months, August/September 2014

Men's leisure activities by age group

18-24 males most likely to have eaten out in past month

Figure 32: Top ten leisure activities in the past month of males aged 18-24, August/September 2014

Men aged 25-44 a core group for drinking and gambling

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 33: Top ten leisure activities in the past month of males aged 25-44, August/September 2014

45-64 men have a more limited leisure repertoire

Figure 34: Top ten leisure activities in the past month of males aged 45-64, August/September 2014

Over-65 males' leisure activities primarily oriented around pubs and restaurants

Figure 35: Top ten leisure activities in the past month of males aged 65+, August/September 2014

Women's leisure activities by age group

18-24 women most likely to eat out in restaurants

Figure 36: Top ten leisure activities in the past month of females aged 18-24, August/September 2014

25-44 women less likely to drink in pubs/bars and to gamble

Figure 37: Top ten leisure activities in the past month of females aged 25-44, August/September 2014

45-64 women less likely to do all forms of leisure activity

Figure 38: Top ten leisure activities in the past month of females aged 45-64, August/September 2014

Over-65 women have preference for eating out

Figure 39: Top ten leisure activities in the past month of females aged 65+, August/September 2014

Which Days of the Week are Leisure Activities Done?

Key points

Living for the weekend?

Figure 40: Leisure activities done, by days of week, August/September 2014

Keeping fit Monday to Thursday

Figure 41: Top five leisure activities ranked by proportion of Monday-Thursday participants, August/September 2014

Clubbing has highest proportion of Friday participants

Figure 42: Top five leisure activities ranked by proportion of Friday participants, August/September 2014

Live sport and music top the list at the weekend

Figure 43: Top five leisure activities ranked by proportion of Saturday-Sunday participants, August/September 2014

Advance Booking of Leisure Activities

Key points

Capacity/availability is biggest influence on advance booking

Figure 44: How far in advance people book leisure activities, August/September 2014

Advance booking of theatre

Figure 45: How far in advance people book theatre tickets, August/September 2014

Advance booking of music concerts and festivals

Figure 46: How far in advance people book music concert/festival tickets, August/September 2014

Advance booking of live comedy

Figure 47: How far in advance people book live comedy show tickets, August/September 2014

Advance booking of theme parks

Figure 48: How far in advance people book theme park tickets, August/September 2014

Advance booking of tenpin bowling

Figure 49: How far in advance people book tenpin bowling, August/September 2014

Advance booking of live sports events

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.cor



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 50: How far in advance people book live sports event tickets, August/September 2014

Advance booking of cinema

Figure 51: How far in advance people book cinema tickets, August/September 2014

Advance booking of zoo/wildlife attractions

Figure 52: How far in advance people book zoo/wildlife attraction tickets, August/September 2014

Advance booking of restaurants

Figure 53: How far in advance people book restaurants (not pubs), August/September 2014

Advance booking of museums, galleries and exhibitions

Figure 54: How far in advance people book museum, gallery or exhibition tickets, August/September 2014

How People Find Out About Deals and Events

Key points

Venue website is preferred place to look for deals/special events info

Figure 55: How people find out about special deals and events promoted by leisure venues, August/September 2014

Women and families key deal hunter demographics

Deal-hunting not driven by low incomes

Entertainment customers most likely to respond to emails

Figure 56: How people find about special deals and events promoted by leisure venues, by type of leisure activity done in past 12

months, August/September 2014
Figure 57: How people find about special deals and events promoted by leisure venues, by type of leisure activity done in past 12 months, August/September 2014 (cont)

Figure 58: How people find about special deals and events promoted by leisure venues, by type of leisure activity done in past 12 months, August/September 2014 (cont)

Which Sectors Could Benefit from Improved Disposable Income?

Key points

Eating out set to be biggest beneficiary of any upturn

Figure 59: Leisure activities people would spend more on if they had more money, August/September 2014

Live comedy, clubs and bowling least likely to receive a boost

Figure 60: Leisure activities people would spend more on if they had more money, by how each activity was ranked, August/ September 2014

Attitudes towards Leisure Activities

Key points

Leisure is about family and friends

Figure 61: Attitudes towards leisure activities, August/September 2014

Women the keenest deal hunters

Opinions divided on automation

Appendix - Market Size Forecast Scenarios

Figure 62: UK leisure* industry market size forecast scenarios, 2014-19

BUY THIS REPORT NOW