

# Leisure Outlook - UK - January 2021

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This report looks at the following areas:



“The closure of pubs and restaurants across large parts of the UK prior to Christmas resulted in a record number of people regularly ordering takeaway food. The momentum gained by the takeaway sector will continue beyond the peak of the pandemic, but those that are yet to offer home delivery should roll this out immediately.”

– Paul Davies, Category Director – Leisure, Travel,

Foodservice and B2B  
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### KEY TAKEAWAYS

- **Takeaway food sector enjoys its moment in the winter sun**
- **The formalisation of casual dining**
- **Participation in virtual leisure increased as restrictions set in**

### IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Consumers remain highly concerned about exposure to and impact of COVID-19**

Figure 1: Consumer concern about COVID-19, February 2020-January 2021

- **Leisure spend severely dented by local and then national lockdowns**

Figure 2: Consumer expenditure on leisure/entertainment compared to prior to the COVID-19/coronavirus outbreak, 8-16 December 2020 and 8-13 January 2021

- **Most people remain uncomfortable with going to leisure venues**

Figure 3: Consumers' level of comfort doing various activities, 10-19 November 2020

### RECENT LEISURE ACTIVITY PARTICIPATION

- **Local lockdowns result in record number of regular takeaway users**

Figure 4: Participation in leisure activities in the last month, fieldwork conducted 29 December 2020-6 January 2021

- **The formalisation of casual dining**
- **Pent-up demand for (smaller) live events once lockdown ends**

### CHANGES TO LEISURE ACTIVITY PARTICIPATION

- **Hospitality sector hurt badly at crucial time of year**

Figure 5: Participation in food and drink related leisure activities in the last month, January 2016-January 2021

- **Indoor venues and cultural events most reliant on a vaccine**

Figure 6: Participation in non-food and drink related leisure activities in the last month, January 2016-January 2021

### INTENTIONS TO PARTICIPATE IN LEISURE ACTIVITIES

- **Local and then national lockdowns halted pub goers' plans to visit more often**

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Figure 7: Anticipated frequency of participation in food and drink related leisure activities amongst visitors, October 2020 and January 2021

- **Opportunity to engage fans of culture with virtual alternatives**

Figure 8: Anticipated frequency of participation in non-food and drink related leisure activities amongst visitors, October 2020 and January 2021

### PROMOTIONS AND DIGITAL INTERACTIONS

- **Participation in virtual leisure increased as restrictions set in**

Figure 9: Usage of leisure promotions and digital services, October 2020 and January 2021

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