

COVID-19 and Out-of-home Leisure: A Year On - UK - April 2021

Report Price: £2195 | \$2995 | €2600

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This report looks at the following areas:

- The impact of COVID-19 on the out-of-home leisure market and what the sector's recovery will look like
- How the pandemic will shape consumers' behaviour and their future leisure habits
- What impact COVID-19 will have on consumers' exercise habits and locations
- Future demand for live entertainment events and livestreaming alternatives
- How the pandemic will impact participation in gambling online and in venues

37% of full-time workers expect to work from home more often than they did before the pandemic, even once COVID-19 is no longer a significant threat. This will have major ramifications for the leisure industry, alongside virtually every other consumer-facing industry.

The pandemic has already inflicted catastrophic damage on the out-of-home leisure sector, with total value falling by almost half in 2020. No other consumer sector is more exposed to enforced closures and social distancing requirements, and the timing of an end to the latter will be crucial in determining the industry's pace of recovery.

Increased remote working and a drop in inbound tourism will weigh heavily on city-based leisure operators, who rely so much on commuters and tourists. The pandemic will hit city economies hardest, and it will take longer for operators based here to recover, meaning there are likely to be some failures when government support comes to an end.

However, with market value likely to be redistributed towards more suburban areas, there are opportunities for leisure brands to expand their footprint along local high streets and in out-of-town retail parks easily accessible by car.



"With leisure activities having been "out of bounds" for so long there is significant pent-up demand for socialising in venues again. The pace of the market's recovery, though, will be heavily dependent on when social distancing requirements are completely relaxed and venues and events can return to full capacity."

– **Paul Davies, Category Director – Leisure, Travel, Foodservice and B2B**

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