This report looks at the following areas:

- Variations between market segments in the pace of post-lockdown recovery.
- The importance of innovation in leisure service and provision.
- Changes in leisure preferences resulting from experience of the pandemic.
- Consumer attitudes towards continuing COVID-19 safety measures, including vaccine passports.

With 75% of online adults saying the COVID-19 pandemic has changed their leisure behaviours and preferences, the post-crisis market will be very different to the one that preceded it, with the biggest shifts being towards local and outdoor activity and a tightening of social circles.

While COVID-19 has been reshaping leisure market demand, it has brought change to the supply side too as operators innovated to maintain their connections with customers while venues were closed. Many of these new models will become permanent and create more efficient, immersive and engaging experiences.

The biggest threat to the market’s full recovery is the return of virus control restrictions imposed in response to new COVID-19 variants, to which all segments remain highly vulnerable. Operators consider vaccine passports potentially fatal for their business but customers see them as a price worth paying to keep venues open.

Fulfilling leisure will be the market’s big growth area in the next normal of the post-pandemic period as people seek activities that are self-improving – for their physical health, mental wellbeing, knowledge and skills – as well as fun.

“A successful COVID-19 vaccination programme has enabled the release of pent-up demand for social leisure in the second half of 2021, despite some consumers remaining cautious about infection risks.”
– David Walmsley, Senior Leisure Analyst
Table of Contents

OVERVIEW
• Key issues covered in this Report
• COVID-19: market context
• Economic and other assumptions
• Products covered in this Report

EXECUTIVE SUMMARY
• Impact of COVID-19 on leisure
  Figure 1: Short-, medium- and long-term impact of COVID-19 on out-of-home leisure*, 2020-25
• The market
• Market reopening sparks rapid recovery
  Figure 2: Market size forecast for the UK leisure industry*, 2016-26
• Britons quick to return to their favourite haunts
  Figure 3: Leisure market* value, by segment, 2021 (est)
• COVID changes leisure behaviours
  Figure 4: Post-pandemic working from home intentions, 2021
• Supply-side shortages add to price pressures
• Companies and brands
• Emergency measures accelerate innovation
• The consumer
• Drinkers and diners fastest to return
  Figure 5: Participation in leisure activities, 2021
• COVID creates new demand for local and outdoor leisure
  Figure 6: Changes in leisure habits, 2021
• Leisure lockdowns shrink our social circles
  Figure 7: Post-COVID changes in social leisure habits, 2021
• Leisure interests shift towards self-improvement
  Figure 8: Future leisure preferences, 2021
• Vaccine passports the lesser of two evils
  Figure 9: Leisure attitudes, 2021

ISSUES AND INSIGHTS
• How will COVID change our leisure lives?
• Lockdown leisure makes it okay to be alone

MARKET SIZE AND PERFORMANCE
• Vaccine success saves leisure operators’ lives
  Figure 10: Short-, medium- and long-term impact of COVID-19 on out-of-home leisure*, 2020-25
• Pandemic pulls plug on prolonged period of growth
Figure 11: Market value of out-of-home leisure*, 2016-21

MARKET FORECAST

• Recovery ready to gather pace
  Figure 12: Market forecast for UK leisure industry*, 2016-26
• Market drivers and assumptions
  Figure 13: Key drivers affecting Mintel’s market forecast, 2017-26
• Forecast methodology

MARKET SEGMENTATION

• Brits rush back to doing what they love
  Figure 14: Out-of-home* leisure market growth, by segment, 2020-21
• Eating out
• Restaurants and pubs constrained by closures and caution
• Home delivery here to stay
• Gambling
• Retail gamblers make rapid return
• Remote gambling shows its resilience
• Health and fitness
• Sports participation finds growth on the doorstep
• Health and fitness clubs set for hybrid approach
• Leisure centres and swimming pools struggle to stay afloat
• Live entertainment
• Music concerts and festivals target full calendar in 2022
• Spectator sports kick on with major events
• Nightclubs threatened by certification moves
• Arts and culture
• Cinema revival relies on blockbusters’ return
• Visitor attractions short on capacity and tourists
• Performing arts can build on livestream success
  Figure 15: Leisure market value, by segment, 2016-21

MARKET DRIVERS

• COVID crisis changes leisure behaviours
• Consumer caution outlasts lockdowns
  Figure 16: Concern over risk of exposure to COVID-19, November 2020-November 2021
• Staying home gives way to staying local
  Figure 17: Post-pandemic working from home intentions, 2021
• Health and wellbeing attract more attention
  Figure 18: Impact of COVID-19 on exercise habits and attitudes, 2021

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

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Consumer confidence to be tested by inflation
Figure 19: Consumer confidence*, 2011–21

Supply-side pressures threaten higher prices
Figure 20: Percentage of businesses finding vacancies more difficult than usual to fill, by sector, 2021

Government support keeps shows on the road

Sustainability climbs the post-pandemic agenda
Figure 21: Concern among Gen Z about the environment, by gender, 2020

LAUNCH ACTIVITY AND INNOVATION

Social entertainment wins more friends
Hybrid models bring high street leisure home
Experimental experiences point to a more immersive future
Still great outdoors
New technologies bring slicker service

LEISURE ACTIVITIES

Diners and drinkers fastest to return
Figure 22: Participation in leisure activities, 2021

More physical activities gain female appeal
Figure 23: Future interest in leisure activities, 2019 and 2021

LEISURE HABITS

Staying local, staying outside, staying safe
Figure 24: Post-COVID changes in leisure habits, 2021

Wellbeing focus plots great escapism
Figure 25: Future interest in leisure activities, by interest in health- and wellbeing-oriented leisure, 2021

SOCIAL LEISURE

Turning inwards to our closest leisure circles
Figure 26: Post-COVID changes in social leisure habits, 2021

We want to be alone?
Figure 27: Changes in social leisure habits among 16–24 year olds, 2021

LEISURE INTERESTS

Self-improvement comes to the fore
Figure 28: Future leisure preferences, 2021

Parents promoting healthier habits
Figure 29: Future leisure preferences, by parental status, 2021

What’s included
Executive Summary
Full Report PDF
Infographic Overview
Powerpoint Presentation
Interactive Databook
Previous editions

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LEISURE ATTITUDES

• Vaccine passports a price worth paying
  Figure 30: Leisure attitudes, 2021
• Young will need affordable luxury
  Figure 31: Leisure attitudes, by age, 2021

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Consumer research methodology

APPENDIX – CENTRAL FORECAST METHODOLOGY

- Market forecast and prediction intervals
  Figure 32: Forecast of leisure market* value, 2021-26
- Market drivers and assumptions
  Figure 33: Key drivers affecting Mintel’s market forecast, 2021-26
- Forecast methodology
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