

Passion for leisure

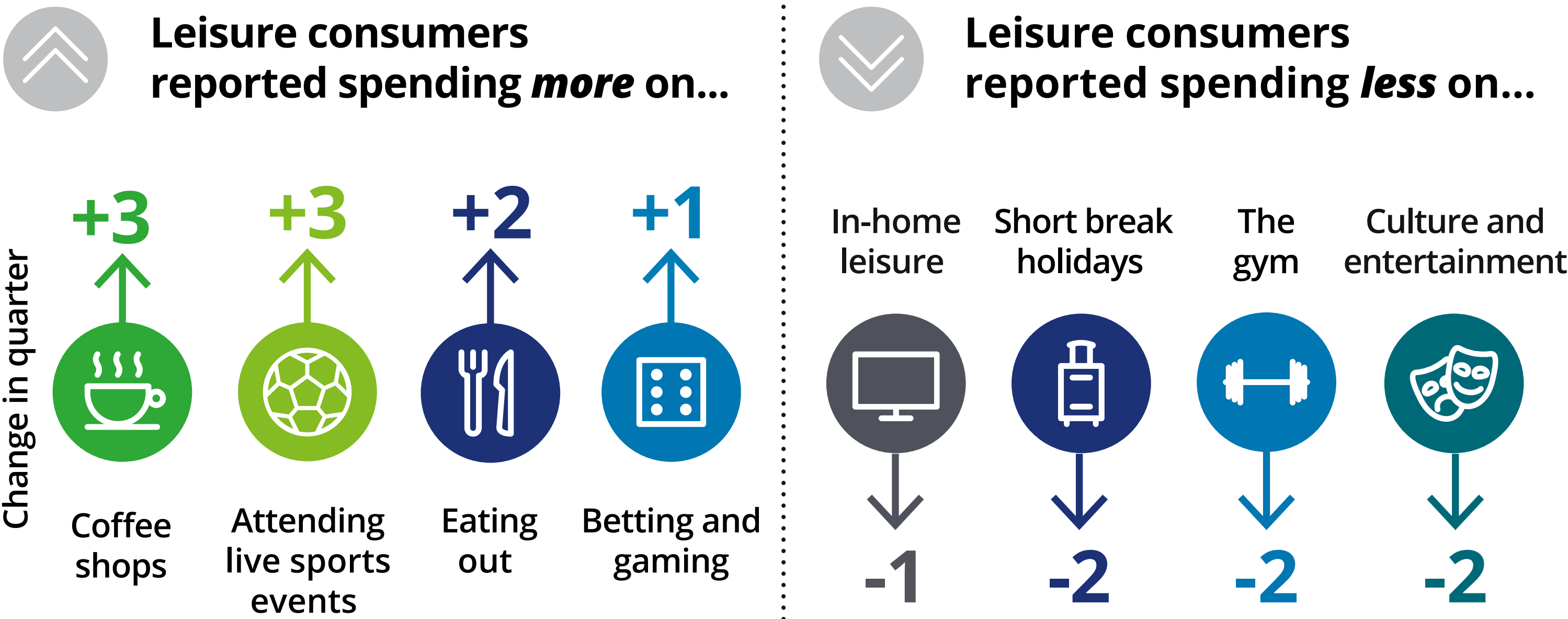
UK Leisure Consumer – Q3 2017



As household income continues to be squeezed, consumers are having to adjust and make choices as to how they want to spend their money. As a result, consumers appear to be increasingly cautious of their leisure spend.

Fancy a cuppa?

Consumers have tightened their spending this quarter compared to the last. However, more consumers have reported increasing spend on taking trips to the coffee shop, having a bite to eat and watching live sport events, compared to last quarter where consumers focused on holidays and keeping fit.



A piece of the action

Attending live sport events is the only category not to see a year-on-year decline in spend. In contrast, consumers are spending significantly less year-on-year on eating out, culture and entertainment, and in-home leisure.



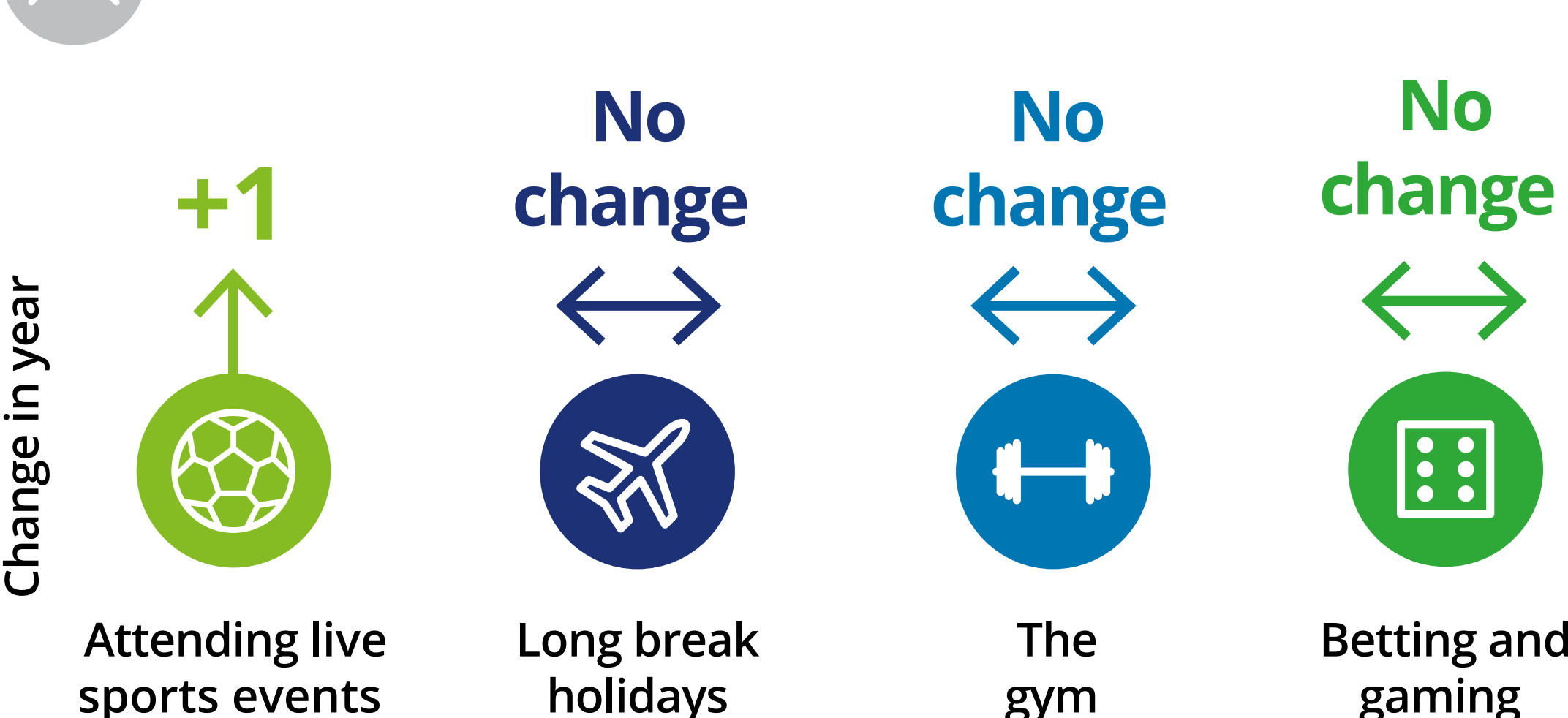
Cheering the team on

It's forecasted that spend on long break holidays, going to the gym and betting and gaming will remain flat. The only category where consumers intend to increase spending in Q4 is live sport events, compared to the same period last year.

Consumers expect to spend less in the majority of categories



Apart from...



Autumn getaways for 18-34s

18-34 year-olds are the only age range expecting to increase their spending on holidays compared to last quarter. They also appear to be reprioritising their spending towards big-ticket leisure activities.

Consumers expect to spend less on...

Category	Previous	Latest
Coffee shops	-15%	-16%
Eating out	-6%	-14%
Betting and gaming	-11%	-14%
Other leisure activities	-11%	-13%
In-home leisure	-12%	-13%
Culture and entertainment	-6%	-12%
Pubs and bars	-5%	-9%

Apart from...

Category	Previous	Latest
Long break holidays	-14%	-11%
Short break holidays	-11%	-8%
Attending live events	-7%	-3%
The gym	0%	-0%

Something to celebrate?

With festive activities round the corner, will eating and drinking out get a boost?

Will consumers still feel the pinch in the New Year?

Will consumers spend more on local entertainment if holiday spending is reduced?

Numerical values represent percentage points which reflect changes in responses from one quarter to the next.