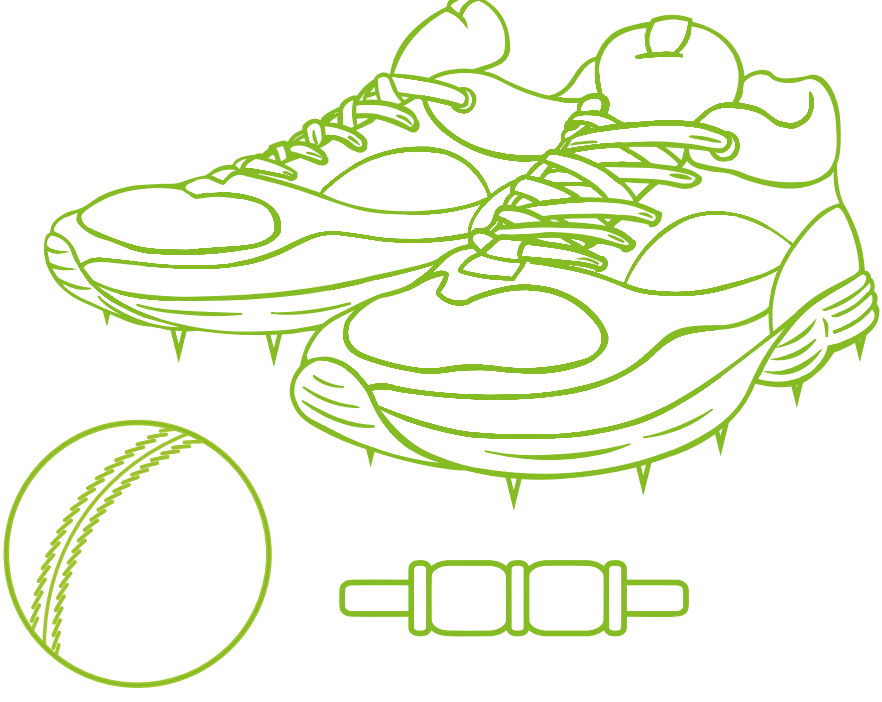


# Passion for leisure

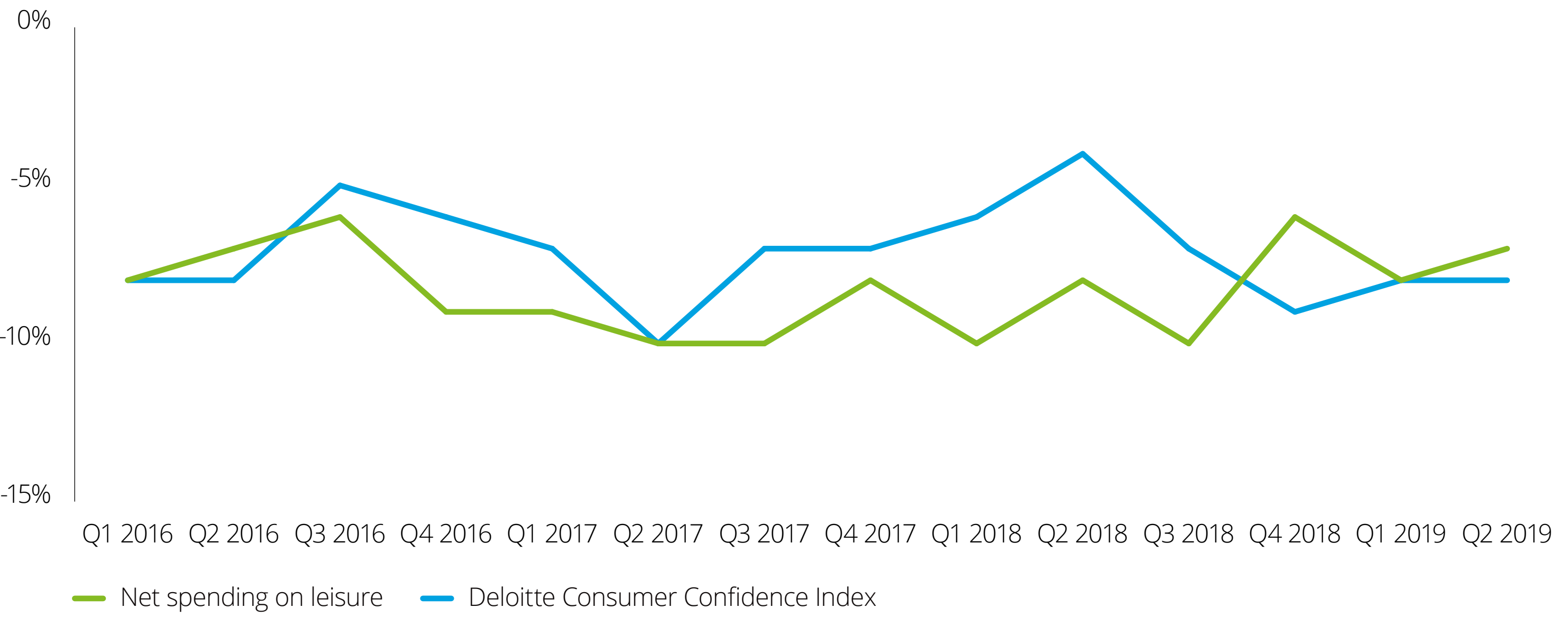
## UK Leisure Consumer – Q2 2019



Consumers continue to be resilient despite political and economic uncertainty. Reported leisure expenditure is up or flat year-on-year in the majority of categories. This is regardless of a fall in confidence and against some tough comparators a year ago when the royal wedding, the heat wave and the start of the football World Cup combined with the recovering earnings sent leisure spending soaring. The question now is: How much longer can they continue to shoulder the burden of powering the economy?

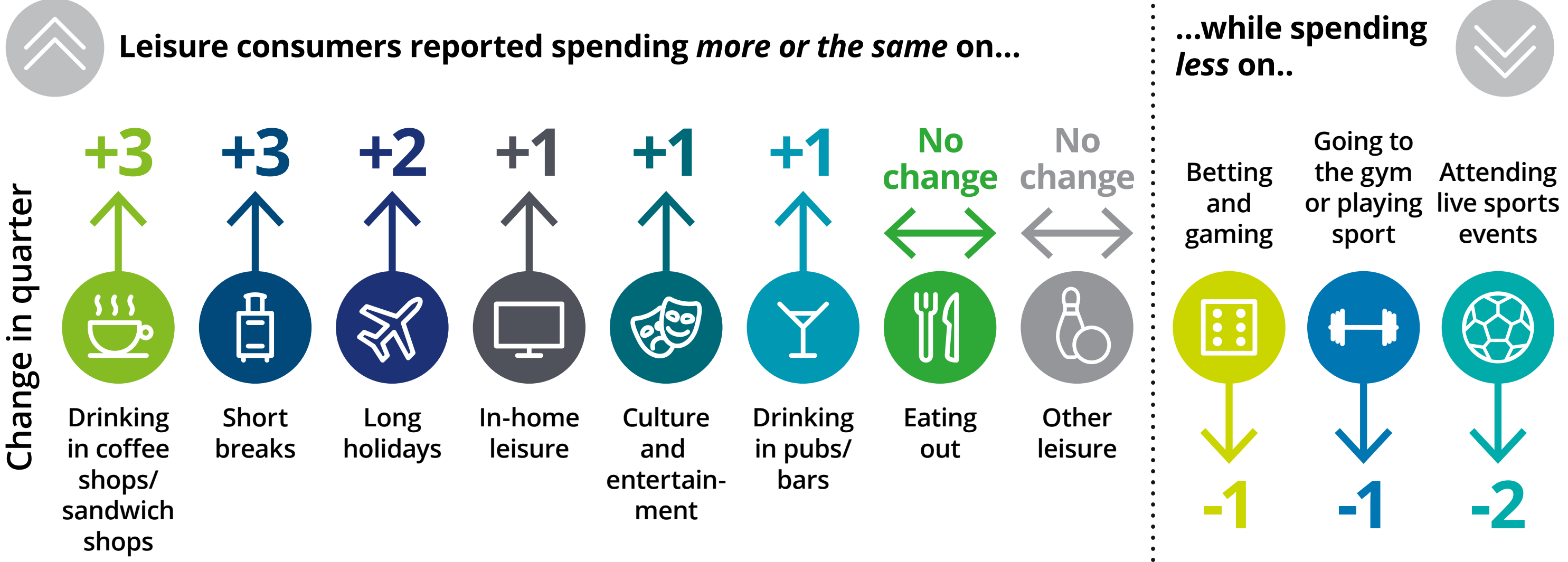
### Leisure spending carries on

UK consumer confidence was down four points compared to a year ago while remaining flat quarter-on-quarter. Year-on-year confidence around disposable income fell by four points while sentiment around jobs security slipped down by three points. Despite this, leisure spending is up by one point both on a quarterly and annual basis. As outlined in our recent report **Experience is everything**, experiences continue to be at the heart of consumers' plans as they look to enrich their lives through non-material things.



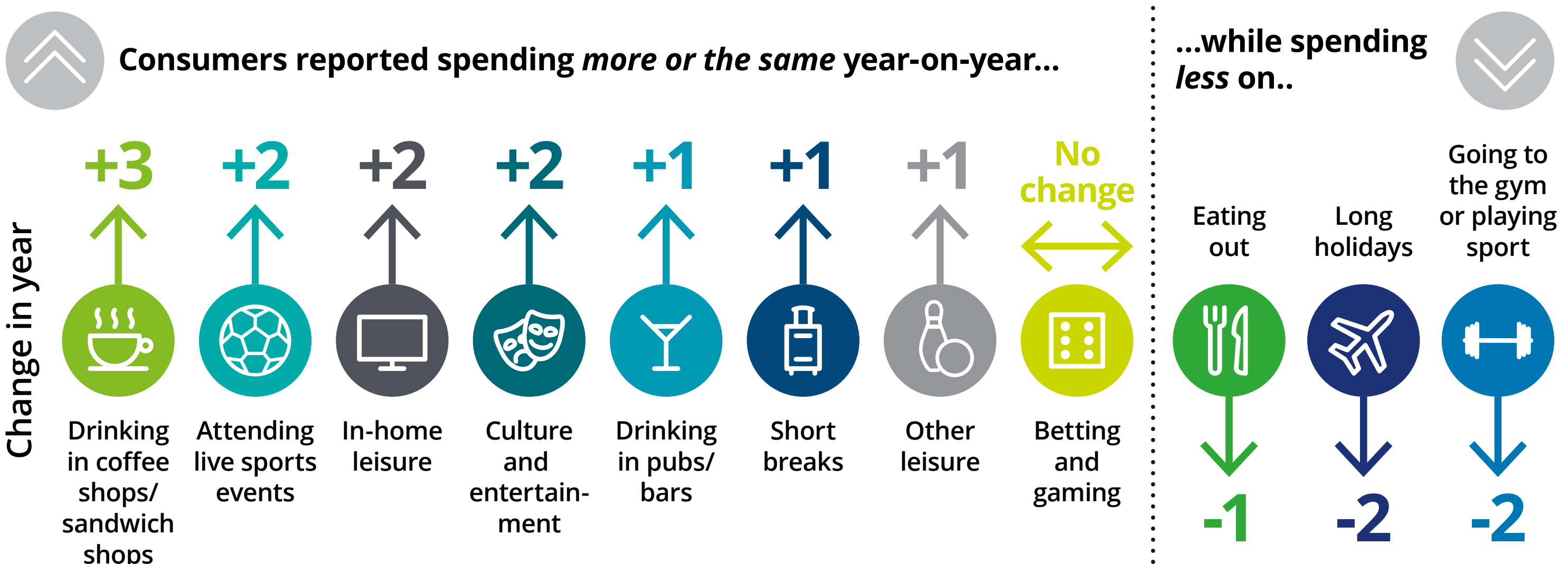
### Everyday leisure

Quarter-on-quarter spending was up or stable in eight out of 11 leisure categories. While seasonal spending is seeing leisure travel expenditure rise, compared to last quarter, consumers are also putting more of their money into some habitual leisure categories. Particularly, net spending on coffee and sandwich shops has edged upwards by three points as consumers have been keen on affordable every day treats.



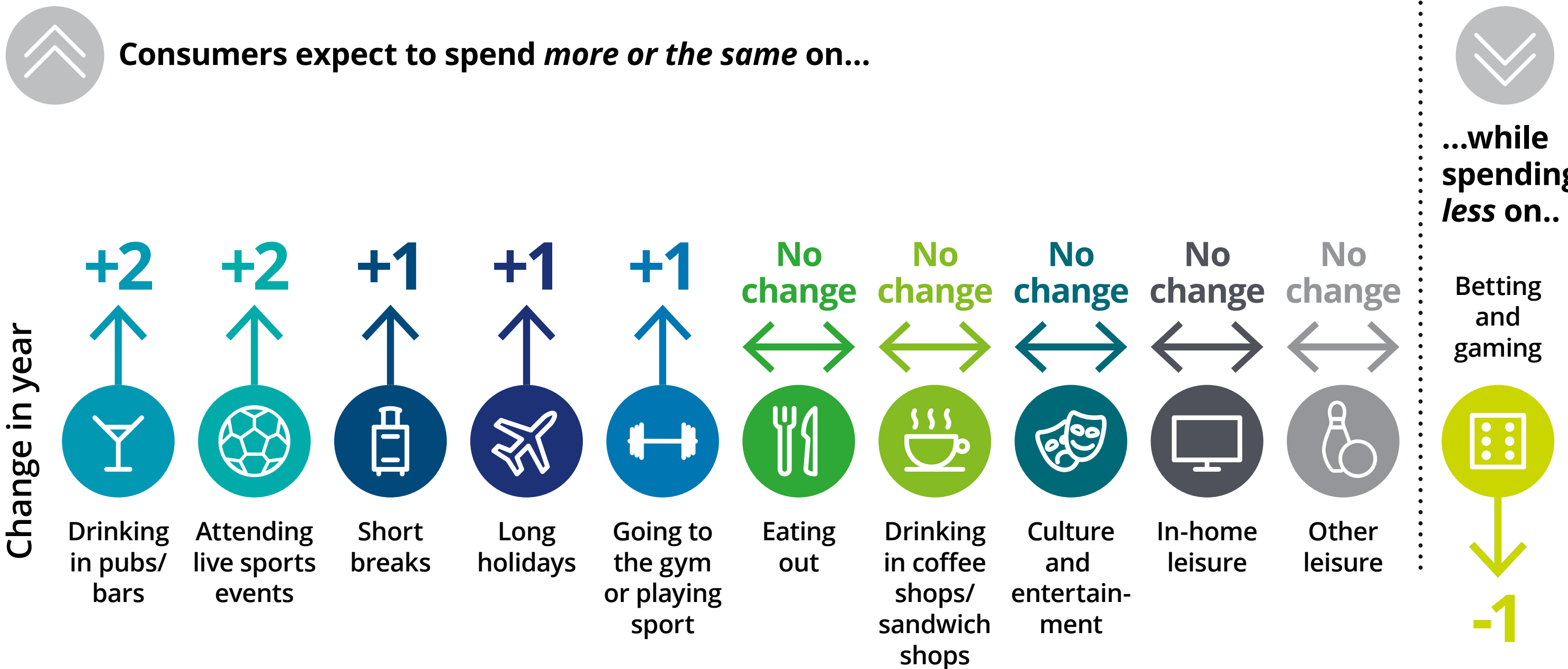
### Should we grab a coffee?

Similarly leisure spending is up or stable in most of the categories compared to this time last year. Both big and small ticket experiences have played a part in consumers' leisure plans, with drinking in coffee or sandwich shops seeing the biggest increases. However, while expenditure on short breaks is slightly up, reported net spending on long holidays is down by two points suggesting that consumers might have delayed their holiday plans until later in the summer or gone for shorter trips.



### Will the leisure consumer keep a cool head?

The planned net spending for the third quarter is higher in five categories while remaining flat in a further five categories compared to this time last year. While holidays and short breaks are on the agenda for the rest of the summer, consumers also intend to head out to bars and attend sport events. Consumers continue to remain positive about the rest of the year with 44 per cent saying they are confident about their personal financial situation for the second half of the year. However, a third (32 per cent) of consumers say they intend to spend less on leisure in the last six months of the year and a quarter (25 per cent) say this is down to the current political and economic uncertainty. Interestingly, consumers aged 55 and over are less likely to reduce their leisure spending in the coming months with only a quarter (26 per cent) saying this and only one fifth (22 per cent) attributing it to the broader uncertainty.



### What's next?



Will leisure spending continue to hold up in Q3 2019?



Will this be a summer of staycations and stay-at-home holidays?



Will England Cricket World Cup victory boost leisure spending?

### Contacts

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