

Value in the leisure sector isn't just about price...

How people judge whether a day out is worth it – and why clarity often matters more than cost.

People weigh up what they get emotionally, intellectually and experientially – not just what they pay. UK household spend on recreation and leisure reached a record £60 billion in 2024 – despite persistent cost of living pressures.

We wanted to explore what this rising trend of experiential spend means for the leisure sector, how consumers are assessing value and how leisure organisations should respond.



Assessing value is complex and multi-layered: Top five drivers of value for money



Key value insights uncovered:

People need **reassurance** that a day out will be worth it before committing – and this need is growing...

"Not being ripped off by businesses is important. A day out can be so costly nowadays, from the moment you leave the house to getting back home."

Free venues are **more likely** to be seen as offering **value for money**, but the difference isn't huge...

Average 'good value' scores among 24 leading national attractions:



Pricing confusion damages value...

41%

Average misclassification of free attraction **as paid**

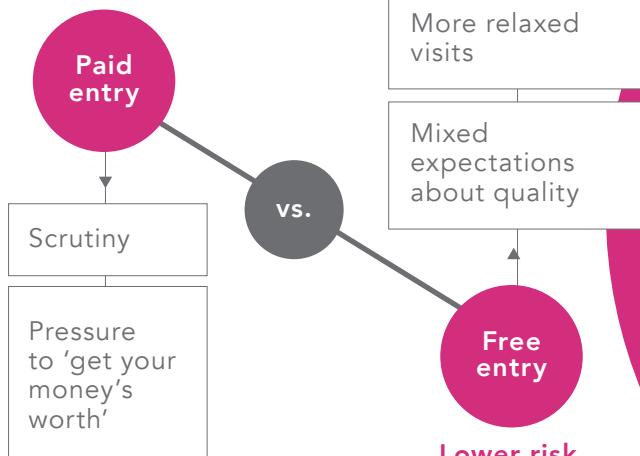
28%

Average misclassification of paid attraction **as free**

Attractions that are poorly understood in terms of their pricing model (whether free or paid) also tend to be rated as **poorer value for money**.

Free entry shifts the psychological 'contract', lowering risk, but also reshaping expectations:

Higher expectations



Three key takeaways:



Make pricing crystal clear (especially for free venues)



Communicate total value, not just cost



Signal quality early & visibly

Source: online survey with 1,045 respondents through our in-house panel Opinion Exchange plus deeper conversations with 30 participants to understand views in greater depth.