AMA RESEARCH

Construction in the Hotel, Entertainment and Leisure Sector Report - UK 2018-2022

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Introduction and Overview

The 8th edition of the **'Construction in the Hotel, Entertainment and Leisure Sector Report - UK 2018-2022'** focuses on the capital expenditure and building programmes of the leading leisure operators including hotel chains, pub companies, gaming, cinema and health club operators. The report will be of interest to clients, construction professionals and supply chains currently involved or seeking involvement in the UK hotel and leisure sector.

Key issues covered in the report:

- Analysis of future prospects for leisure sector construction in 5 key areas - Hotels, Health Clubs, Betting, Gaming & Casinos, Cinemas, Pubs Bars and Restaurants.
- Focus on the structure and size of the sectors, key trends and prospects for construction and development activity going forward.
- Detailed analysis of the value of new build and refurbishment programmes in the leisure industry including development pipelines in each sector and expansion plans.
- Review of contractor experience, project delivery and capability in leisure sector with examples of contractor project experience.

Areas of particular interest:

- Construction market overview: total construction output to 2022; non-residential construction output; output by sub sector.
- Entertainment/leisure construction - output by sub sector.
- Future prospects for entertainment/leisure construction - key drivers and influences.
- Entertainment sector refurbishment and fit out in the UK.
- Building programmes and capital expenditure in the entertainment sector.
- Key leisure sector influences: value of tourism to the UK; prospects for UK tourism spending.

Some of the companies included:

Ardmore, Arora Group, BAM, Berkeley Group, Bowmer & Kirkland, Carter Lauren Construction, Galliford Try, Interserve, ISG, Kier, Marshall, McAleer & Rushe, McLaren Construction, Morgan Sindall, Ogilvie, Integrity Refurbishment, Radford Group, Revo Group, RG Carter, Russells Construction, Styles & Wood, Overbury, Phelan, Midas, Sir Robert McAlpine, Sisk, Tolent, Wates, Speymill, Vinci, WFC Fit Out, Watkin Jones, Willmott Dixon Interiors.

CONTRACTOR CAPABILITY IN HOTEL AND ENTERTAINMENT

- Leading contractors in the leisure, entertainment and hotels sector. Contractor market shares.
- Value of projects by sub sector.
- Major leisure sector projects: sports stadia and venues; leading contractors in the sports stadia/venue sector; hotel and accommodation sector: leading hotel construction supply chains; leading contractors in the hotel sector.

HOTEL SECTOR IN THE UK

- Structure, size and value of the UK hotel sector.
- Performance of the hotel sector in 2017 - key indicators and key drivers of growth. Future prospects 2018-2022.
- Leading suppliers to the UK hotel sector: corporate activity; major chains and sectors in the UK hotel sector.
- The budget hotel sector in the UK: market size; leading budget hotel chains in the UK. Other hotel sectors: mid-range hotels; luxury hotels.
- Aparthotels/ serviced apartments sector.
- Building programmes/ capital expenditure in the hotel sector: hotel development pipeline UK; development pipeline in London; regional 'hotspots'; gontinued growth of the budget sector.
- Hotel construction data: construction costs in the hotel sector; use of modular construction methods.

HEALTH & FITNESS SECTOR IN THE UK

- Sector size and structure.
- Leading health club operators in the UK.
- Budget gym operators.
- Building programmes in the health clubs sector.

BETTING & GAMING SECTOR IN THE UK

- Sector overview & size: casinos and gaming halls; bingo halls; cinemas & multiplexes.
- Leading operators in the cinema exhibition market.
- Building programmes & capital expenditure in the entertainment venue, betting & gaming sector.

FOOD & BEVERAGE SECTOR IN THE UK

- Pubs, bars and clubs: overview; size of UK pub sector; key players in the pub market.
- Restaurants and cafes: sector overview & size; leading operators in the restaurants sector; industry trends.
- Building programmes and capital expenditure in the food & beverage sector.

Report Summary

Dominated by the private sector, the entertainment and leisure sector has experienced more positive construction output conditions than many other sectors over the past 5 years. Despite a dip in 2015, output in the sector has remained relatively steady since 2013.

Expansion and investment has been largely confined to the budget hotels, health and fitness and more recently the cinema segments, with less buoyant activity in mid-market hotels, beverage-led pubs and the gaming sectors where major operators have so far reigned in capital spending plans. The largest sectors for construction output are similar with restaurants, bars, clubs and also hotels being the largest two sectors in 2017.

The leisure and tourism industry is highly fragmented, with a number of large commercial chains dominating the hotel and pub sectors in particular, and a large number of smaller specialist operators in the restaurant, gaming and hotel and lodging sectors.

Current forecasts for entertainment and leisure sector construction output over the medium-term indicate good overall growth to 2022; however, the diversity of the sector means that growth prospects vary considerably between sub-sectors, with recent growth in the budget and high-end hotel and budget gym and restaurant sectors helping to offset the decline in the pubs and clubs sector.

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