"In our leisure we reveal what kind of people we are

CACI | DO AMAZING THINGS WITH DATA

Contents

Introduction

The way we shop, spend our leisure time, and engage with space has changed forever. This means that brands and places need to rethink how they connect to their customers, from acquisition, through marketing, engagement, delivery and location. The fallout of the pandemic has been wide reaching, carving out new behaviours and accelerating many of the trends that were already emerging beforehand.

The digital divide has blurred, which means where a customer transacts is now irrelevant, what motivates them to transact is key. Consumers will continue to shift spend between channels and future behaviours. This now means offering both a hyper-local and personal offering through more diverse formats, ranges and omni-channel services that meet local demands.

However, whilst many retail purchases have migrated onto digital channels, consumers still prefer human interaction to fulfill their the need for 'experience'. One industry that is best placed to fill this need, is the leisure industry. The tangible is essential and customer service is still king. It's where people engage with place, engage with essence of the brand and interact with other people. With the drive to be more sustainable and concern over the environment the proportion of consumer expenditure on leisure activities will change with the current market. Experience in line with consumers principles will be important.

We are spending equal time between our workplace, home and in our local communities, increasing the demand for local products and services but still enjoying various brands. Local-ism is here to stay and businesses should tailor their strategies to reflect where customers will be, not where your locations necessarily are. The research from our worker change model shows the shifts in footfall in both traditional workplaces and local communities. The shift to sustained working from home has redefined the traditional work life equilibrium - the office has become the place where people collaborate, work and socialise, whilst the home is where live, work and socialise.

It's arguably the Leisure industry that stands to benefit most from a detailed understanding of people and place. Where people live, work and play and their movement in and around these anchors reveal likely destinations for socialising and sustenance. This extends to day-part planning, especially if you cater for breakfast, lunch, dinner and all those treats inbetween.

And let's not forget, opportunities outside of traditional high street destinations are on the rise. Food Halls are becoming the norm in shopping centres attracting the 'all-day shopper'. Mixed use developments combining residential and commercial space present leisure operators the chance to sit below a lucrative local community of convenience customers.

To succeed in this new consumer reality, brands need to centre their plans around their customers as individuals – adapting locations, marketing and propositions to their attitudes, needs.

Arabella Dalloz

Managing Consultant – Head of Leisure
+447850177544 / adalloz@caci.co.uk

Leisure Acorn

Recognising the demographics, lifestyle attributes and leisure pursuits of the people who interact with your brand has never been more important. Acorn, CACI's geodemographic segmentation, provides a detailed understanding of the consumer characteristics of people and places across the UK. By segmenting households, postcodes and neighbourhoods into 6 categories, 18 groups and 62 types – Acorn provides precise information and in-depth understanding of the different types of people who live in a particular area.

Leisure Acorn take this a step further and recategorises the 18 Acorn groups not only by traditional metrics like life stage and affluence, but more specifically their leisure pursuits. With this information you can learn more about your customers' behaviour and identify prospects who most resemble your target customers, define local demand for eating and drinking, health and well-being, lifestyle, entertainment, holidays & travel, recreation & culture and shopping.

Fully rebuilt and updated annually with the latest and newly available data, Leisure Acorn can support your organisation in:

- Understanding leisure engagement by key consumer groups
- Deliver intelligence on local populations
- Assess local demand for products and services
- Inform network strategies and identify where to target investment
- Tailor services to customer requirements through the right format and ranging.
- Create personalised messaging for each channel in the right location
- Target online display and social media advertising

Leisure Acorn can also be used across all channels from traditional direct marketing to digital advertising. The rise in the use of digital technologies, omni-channel commerce and the increase in economic pressures are all reflected in the lifestyles, behaviours, and spend profile of the different groups.

Quality-led families

Lavish lifestyles | Executive wealth

Quality-led families are very affluent consumers, living in owned houses with high disposable incomes. This group of people are likely to be very active in their free time and they regularly eat out and travel frequently.

13.6% UK POPULATION

9.1M UK INDIVIDUALS

Demographics

Older Families	45-64	Owned outright	£63K	£31K
Lifestage	Age band	House type	Household Income	Disposable Income

Leisure activities

- Eating out
- Drinking out
- Coffee shop visits
- Cinema visits
- Exercise regularly
- Trips & short breaks

Brand affinity

wagamama · Zizzi Ristorante · Costa Coffee · Pizza Express

Eating & drinking out

Waitrose · Sainsbury's · M&S

Grocery

cineworld · Marriott Hotels · Resorts · Suites · David Lloyd Clubs

Recreation & culture

leisure expenditure

£120	£65
Recreation & culture (per adult per week)	Restaurants & hotels (per adult per week)

Social networking

Facebook · Instagram · WhatsApp

Key media publications

The Telegraph · THE TIMES

Most likely to respond to

- Email
- Newspaper ads
- Mail

Steady regulars

Mature money | Successful suburbs | Steady neighbourhoods

Steady Regulars are mid-affluence older consumers with traditional leisure habits. These consumers try to balance staying at home and going out and also care about healthy nutrition.

23.2% UK POPULATION

Demographics

Older Families	50-64	Owned outright	£45K
Lifestage	Age band	House type	Household Income

Leisure activities

- Eating Out
- Drinking Out
- Coffee shop visits
- Cinema visits
- Exercise

Brand affinity

Beefeater London · Harvester · Brewers Fayre · ASK Italian

Eating & drinking out

Waitrose · Sainsbury's · ALDI

Grocery

the nia birmingham · Bannatyne Health Club & Spa · Holiday Inn

Recreation & culture

Leisure expenditure

£79
Recreation & culture (per adult per week)

Social networking

Facebook · Instagram · WhatsApp

Key media publications

The Telegraph · Daily Mail

Most likely to respond to

- Email
- Newspaper ads
- Mail

Young Experience-Seekers

City Sophisticates

Predominantly young professionals with higher incomes, concentrated in large towns and cities. Physically active and open to new and exciting experiences, Young Experience Seekers are also the first to try new technologies and trendy new brands.

3.4% UK POPULATION

2.3M UK INDIVIDUALS

Demographics

Lifestage	Age band	House type	Household Income	Disposable Income
Singles & Couples	25-34	Privately renting	£54K	£15K

Leisure activities

Eating out | Drinking out | Coffee shop visits | Cinema visits | Exercise regularly | Trips & short breaks

Brand affinity

Eating & drinking out: wagamama, Côte Brasserie, Slug & Lettuce, Pret

Grocery: Waitrose, Sainsbury's, TESCO, M&S

Recreation & culture: Tate, Vue International, Hilton Hotels & Resorts, Fitness First

Leisure expenditure

Recreation & culture (per adult per week)	Restaurants & hotels (per adult per week)
£70	£85

Social networking

Key media publications

The Guardian, The Times

Most likely to respond to

Email | Internet ads | Posters

Active young families

Career Climbers | Starting Out City Sophisticates

Active Young Families are likely to live hectic lifestyles, as they try to balance demanding careers with bringing up young children. These consumers are likely to eat frequently and also enjoy take-away meals and a night out in the pub.

10.0% UK POPULATION

6.7M UK INDIVIDUALS

Demographics

Lifestage	Age band	House type	Household Income	Disposable Income
Younger Families	25-44	Privately Renting	£44K	£16K

Leisure activities

Eating out | Drinking out | Coffee shop visits | Cinema visits | Exercise regularly | Trips & short breaks

Brand affinity

Eating & drinking out: Frankie & Benny's New York Italian Restaurant & Bar, Five Guys, Pitcher & Piano, Starbucks Coffee

GROCERY: Waitrose, Sainsbury's, TESCO, M&S

Recreation & culture: Travelodge, Vue International, Legoland Windsor Resort

Leisure expenditure

Recreation & culture (per adult per week)	Restaurants & hotels (per adult per week)
£65	£48

Social networking

Key media publications

The Guardian, The Observer

Most likely to respond to

Email | Leaflets | ON-Pack

Social Seniors

Comfortable Seniors

Social Seniors are mid-affluence older consumers with traditional leisure habits. These consumers are likely to travel frequently and prefer to drink at home.

2.3% UK POPULATION

1.5M UK INDIVIDUALS

Demographics

Retired Couples	65+	Owned Outright	£32K	£19K
Lifestage	Age band	House type	Household Income	Disposable Income

Leisure activities

Eating out

Drinking out

Coffee shop visits

Cinema visits

Exercise regularly

Trips & short breaks

Brand affinity

Eating & drinking out: BEEFEATER LONDON, bbs bakers + baristas, Brewers Fayre, Table Table

Grocery: M&S, Morrisons, co op, ALDI

Recreation & culture: Bannatyne Health Club & Spa, BW Best Western, Chester Zoo

Leisure expenditure

£52	£30
Recreation & culture (per adult per week)	Restaurants & hotels (per adult per week)

Social networking

9% less likely to visit social media networking sites daily.

Key media publications

The Telegraph

Daily Mail

Most likely to respond to

Mail

Newspaper ads

Leaflets

Student Socialites

Student Life

Student Socialites are young and varied shoppers. They often treat themselves to premium, new and exciting leisure activities and spend a lot of their disposable incomes on leisure. They are also more likely to go somewhere different on holiday every time.

2.7% UK POPULATION

1.8M UK INDIVIDUALS

Demographics

Families	16-24	Privately Renting	£31K	£8K
Lifestage	Age band	House type	Household Income	Disposable Income

Leisure activities

Eating out

Drinking out

Coffee shop visits

Cinema visits

Exercise regularly

Trips & short breaks

Brand affinity

Eating & drinking out: CAFFÈ NERO, SUBWAY, Nando's, Bella Italia Pizza Pasta Grill

Grocery: Sainsbury's, TESCO, LIDL

Recreation & culture: cineworld, Citadines, Pure Gym enjoy fitness

Leisure expenditure

£37	£44
Recreation & culture (per adult per week)	Restaurants & hotels (per adult per week)

Social networking

Key media publications

theguardian

INDEPENDENT

Most likely to respond to

Cinema ads

internet ads

Posters

Budget-Restricted Families

Modest Means | Striving Families

Budget Restricted Families are larger families with multiple, often younger, children living at home. Although these consumers are more likely to stay at home and eat take-away meals, they are likely to go out for a drink or to the cinema occasionally.

16.1%	10.8M
UK POPULATION	UK INDIVIDUALS

Demographics

Families	25-49	Owned Outright	£31K	£14K
Lifestage	Age band	House type	Household Income	Disposable Income

Leisure activities

Eating out | Drinking out | Coffee shop visits | Cinema visits | Exercise regularly | Trips & short breaks

Brand affinity

Frankie & Benny's – New York Italian Restaurant & Bar | GREGGS | TOBY Carvery – Home of the Roast | Hungry Horse

Eating & drinking out

ASDA | ALDI | Morrisons – Since 1899

Grocery

Travelodge | Places for People | Drayton Manor – Theme Park

Recreation & culture

Leisure expenditure

£50	£33
Recreation & culture (per adult per week)	Restaurants & hotels (per adult per week)

Social networking

Key media publications

The Sun | Daily Mirror

Most likely to respond to

Leaflets | Internet ads | Tv or radio

Payday Persuits

Young Hardship | Struggling Estates | Difficult Circumstances

Payday Pursuits are low affluence shoppers, with below average incomes and stretched household budgets. Price, but also convenience, are important, which means they are less likely to eat out regularly and travel.

17.0%	11.4M
UK POPULATION	UK INDIVIDUALS

Demographics

Singles & Families	25-34	Social Renting	£24K	£8K
Lifestage	Age band	House type	Household Income	Disposable Income

Leisure activities

Eating out | Drinking out | Coffee shop visits | Cinema visits | Exercise regularly | Trips & short breaks

Brand affinity

SUBWAY | GREGGS | TOBY Carvery – Home of the Roast | All Day Long – Yates

Eating & drinking out

Iceland.co.uk | Morrisons – Since 1899 | LIDL | ASDA

Grocery

Citadines | the gym – find your fit | Picture House – The love of cinema

Rrecreation & culture

Leisure expenditure

£36	£26
Recreation & culture (per adult per week)	Restaurants & hotels (per adult per week)

Social networking

Key media publications

Daily Mirror | Daily Star

Most likely to respond to

Tele marketing | Leaflets | Mobile message

OTHER PRODUCTS

Leisure Footprint

Leisure Footprint is CACI's leisure specific consumer catchment model, reporting on and ranking over 6,500 leisure destinations across the UK. Calibrated using a combination of real transactional data from a leading bank, telco location data and extensive face-to-face research – Leisure Footprint gives a unique perspective on the available leisure spend for major city centres, leisure parks, shopping centres, small rural towns and everything else in between.

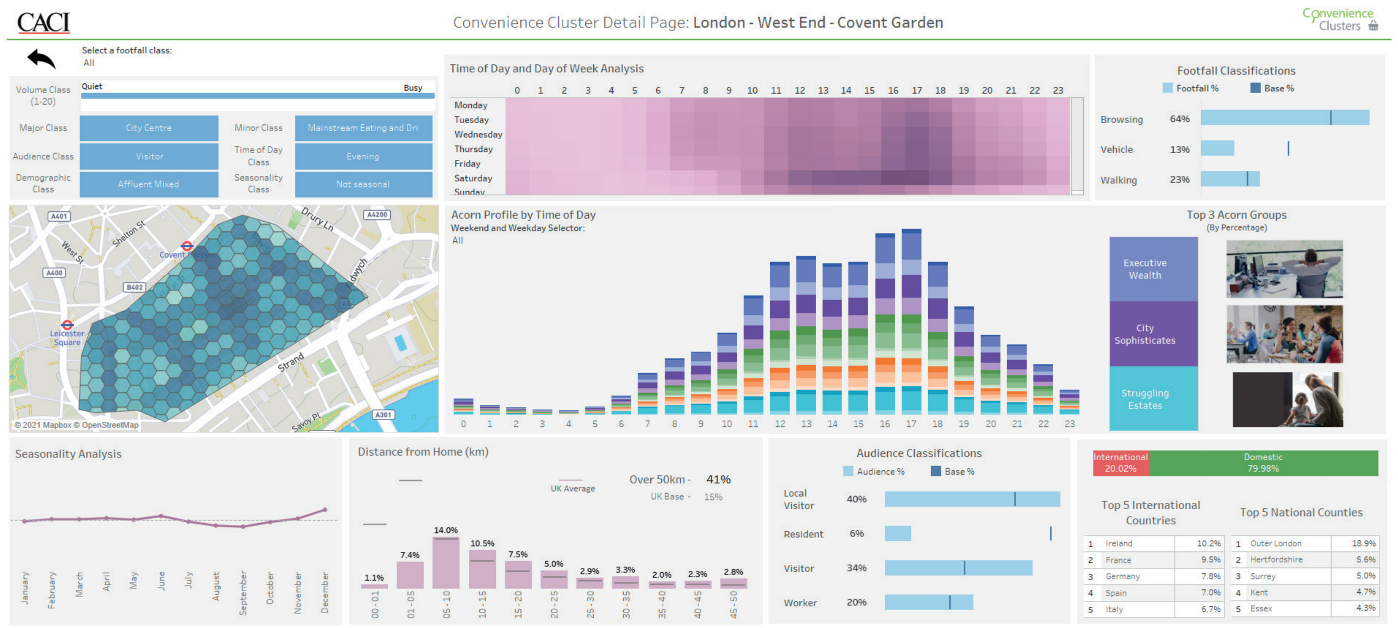
Each centre is uniquely assessed by combining all the factors that affect performance, including the quality and quantity of leisure provision, consumer demographics, price point, centre function and the level of competition. Detailed centre catchments highlight the overall market potential for 10 key categories (e.g. food, alcoholic drinks, entertainment), split by Leisure Acorn and residential/worker spend.

Representing true consumer spending habits and an accurate picture of local market potential, Leisure Footprint can:

- Quantify the reach of a centre and the shape of its catchment
- Provide detail on who shops where, and how much spend flows through a centre
- Estimate available expenditure within each centre
- Understand the demographic profile of each centre by Leisure Acorn
- Assist in location planning decisions and network optimisation
- Quantify the potential of digital channels (e.g. delivery)
- Assess market share and site performance
- Better understand network overlaps and cannibalisation

Local Footprint

CACI's Local Footprint and Consumer Movement data describe the extent and function of 33,000 locations - covering everything from the breakdown of larger Leisure Footprint centres, transport hubs, motorway service stations and even the smallest of parades.



Integrated with demographically coded mobile location data, this product provides detailed insight on the relative footfall across each micro location – broken down by time of day, day of week and consumer type. This provides incredibly powerful information on each of the locations local offer, mission, and levels of engagement.

As destinations across the UK continue to adapt to the new consumer reality, understanding micro locational factors is becoming increasingly important. As brands look to unpick the broader implications of increased remote working, unpredictable tourism, and the drive for people to shop locally - this data will be crucial in helping brands deliver the right leisure proposition to each local community.

Utilising Local Footprint and Consumer Movement data will enable you to:

- Identify where to locate specifically within towns and cities
- Evaluate the strength of smaller local parades and convenience led destinations
- Ensure a location has the right footfall (by acorn) at the right time of day/week/year
- Tailor your offer and format to meet the needs of the local community
- Optimise your network and open hours in each location
- Identify where to trial offers, formats and initiatives
- Quantify the relationship between residents and workers
- Understand the important of international and domestic tourism

Detailed Banking Data

The way people shop changed radically during pandemic, pushing sales online, increasing the importance of convenience, and changing the way people interact with all types of locations. This has left many operators, especially those with limited customer data struggling to make sense of the new consumer reality.

Now restrictions have lifted and living costs are rising brands are fighting for market share - one way you can cut through this uncertainty is by utilising CACI's detailed banking data derived from real transactions from several top UK banks. Coded by leisure acorn – the data records weekly transactional spend from debit/credit card spend for over a hundred of brands across a range of sectors. The banking data is so rich in detail it can also be provided at post sector level or even the physical unit where the transaction took place.

Detailed banking data provides a step change in developing real-time demographic insight to answering the following questions:

- Customer Insight: Who are my customers and how much do they spend by location?
- Tracking Change: How have specific locations performed pre, during and post pandemic and in response to changing living costs?
- Local Performance: How are specific locations performing relative to the local market?
- Digital vs in-store: How does digital (e.g. delivery) and physical spend compare by location?
- Competitor Understanding: Who is spending with competitors in my local area?
- Impacts: How have I been impacted by new openings, closures or specific events?
- Real Catchments: Where do my customers come from?
- Marketing Attribution: Who engaged the most with my local marketing campaigns?

Five Guys

Five Guys have been working with CACI for a number of years, using their Retail Markets data to support Location Strategy decisions in the UK.

As the UK estate has grown and the European Market expansion commenced, it became clear that the learnings from the UK market needed to be applied to the European expansion, so that decisions became more reliant on data and less intuitive. After all, there is a lot at stake when opening 40 - 50 sites a year.

Five Guys transitioned from the standardised data approach to a bespoke CACI / Five Guys Network Strategy Plan for UK, France, Spain & Germany.

The decisions for each site acquisition are also supported by their mobile app data and reports, which really do give detailed insight into each specific site under review. Demographic profiling, footfall by hour/day of the week and cannabalisation information, has brought a step change to our site acquisition decisions and our ability to build reliable 5 year plans in each market.

“CACI have been a vital partner in developing a sustainable but ambitious expansion strategy grounded in detailed insight and data. We can fully commit to our plans with more confidence of them being successful.

Richard Collier
Property Director - Five Guys JV Ltd

ITSU

"With the pace at which the High Street and the F&B industry is changing, we have found CACI insightful, current, focused and a key ingredient in our recipe for success at itsu.

With the CACI insights over the years on customer demographic we have been able to test the viability of our new potential units in areas both within London & Nationally vs our current estate where we know what works for our brand & our customers.

"Through the insights provided we have been able to target workers in areas who love our brand and open new units that have proved successful

Vishal Talreja
Property Director – Itsu

The CACI data and insights help us build commercial cases for locations and is a key piece of the jigsaw for our New stores strategy & our property pipeline.

In more recent times, the insights have evolved to incorporate the growing delivery market and key towns outside of the capital with huge potential. As well as a more wider geographical heat map rather than on a single site or town basis that we have traditionally had insights into."

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Call: +44 (0)20 7602 6000 Web: www.caci.co.uk