

WET LEISURE
SURVEY
2024

RESULTS

Survey conducted by



in association with



WET LEISURE SURVEY RESULTS 2024

Welcome to the fourteenth year of the Wet Leisure Industry Survey conducted by Golden Coast.

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This has been the first year that the survey has been purely digital and that appears to have had an effect on the number of responses, however there are still insights to be gleaned and knowledge to be shared.

How does it work?

After thirteen years, most people in our industry will be familiar with how the survey works but we can re-cap.

The original concept of an industry wide survey came from Golden Coast and was simply this, other industries have facts and figures that are available to help people make better decisions and grow better businesses. We should be the same. The first Survey took place in 2010 and the results were published at SPATEX the following year.

Within the year the Wet Leisure Industry Survey had received the full support of the BSPF and soon that support spread to Swimming Pool News, ISPE, Swimming Pool Scene and Hot Tub and Swim Spa Scene, SPATA, BISHTA and WhatSpa.

The annual survey has taken a broadly similar form for its fourteen years.

Towards the end of October every business in the wet leisure industry is invited to take part in the survey. The invitation comes in the form of an email, social media or in industry magazines and publications. People who choose to take the survey can do so by filling in an online questionnaire or, previously, returning a paper response. Every response, either digital or paper, is anonymous.

The survey generally stays open until mid-January at which point all the responses are collated and the final report is written and shared with the whole industry.

The report is usually available for anyone to collect at SPATEX as well as being available for free download from goldenc.com or wettleisure.com; a site dedicated to the Wet Leisure Survey that hosts the results from all previous years.

What did we learn this year?

Everyone who works in the wet leisure industry will have his or her own idea about how a year has gone. They will have a sense of whether things have been good or bad and what has made them so.

The benefit of the survey is that it brings this knowledge and opinion together from all ends of the country and from businesses of all shapes and sizes.

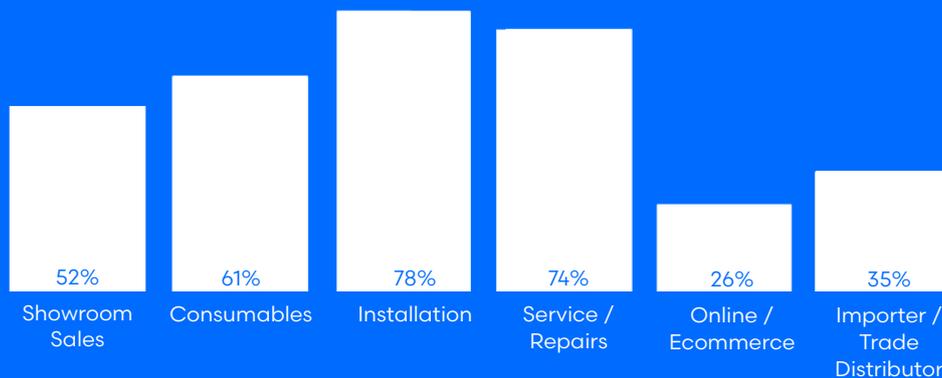
For people running their own business it can be hard to differentiate between how their own business is performing compared to the industry in general.

The survey can give you that perspective.

Challenges for service companies

Service and repairs has long stood as the service most offered to respondent's customers but this year it slipped down the rankings a little.

What are the services you offer your customers?



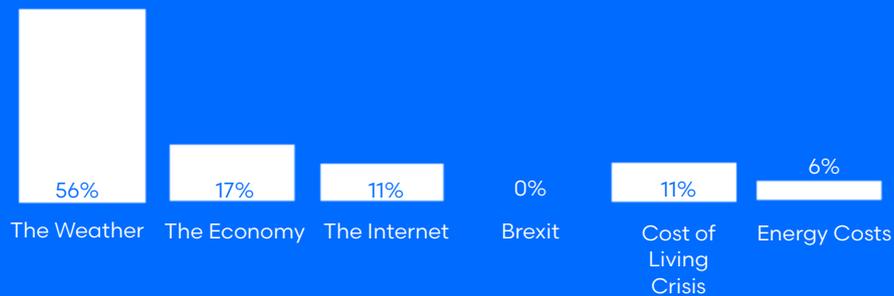
This might be due to growth in the installation market, which has certainly seen a strong year, or challenges facing the service and maintenance companies.

Respondents have specifically said that poor weather has meant that pool owners were less keen to open their pools and were using them less leading to less service hours.

Worryingly, another service company owner reported, ***"We are seeing an increased amount of customers failing to pay after servicing using the smallest excuses to not pay or to force a discount. Consumer moods are very low and customers are getting increasingly more short and unfriendly with our staff reflecting the mood of the nation right now."***

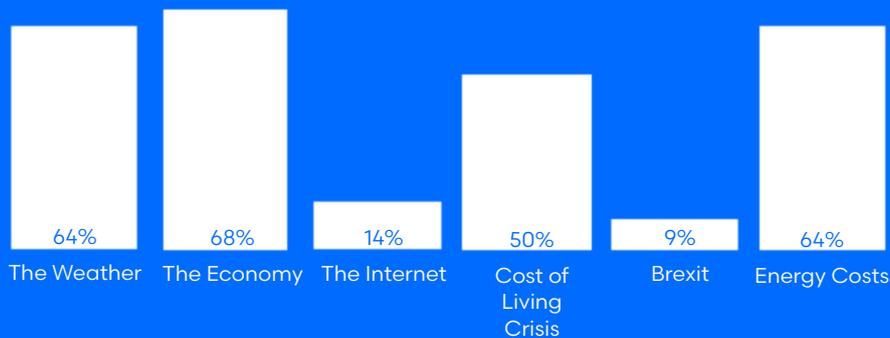
However, for this sector of our industry, the weather seems to be blamed for having the most influence. Service levels are tied to running a pool, not just owning a pool, so it makes sense that weather conditions have a direct and immediate impact on their business.

What has had the most impact on your service and maintenance business in 2024?



If in comparison, we look at the industry as a whole, financial issues such as energy costs, the economy and the cost of living overshadow the weather's influence.

What would you say were the things that had the biggest influence on your business this year?



One respondent summed up their concerns; *“Political uncertainty stalled the bounce back in the economy which then led into the Autumn/Winter so we did not see the usual Summer spike in sales. Showroom footfall was the worst it’s ever been in 20 years of business.”*

Across the whole UK economy, businesses face challenges from economic uncertainty, high labour costs and weak consumer spending.

The wet leisure industry's concern about the impact of the weather is a legitimate one.

No matter what is going on in the economy in any given year, the weather – be it good or ill – tends to be a stronger influence. Summer 2024 was the UK's coolest since 2015. Mean temperatures in June and July were slightly below average across the UK, driven by a south-shifted jet stream that brought northerly winds carrying Arctic air. Cold air from the Arctic is no encouragement to opening your pool or spa or indeed buying a new hot-tub.

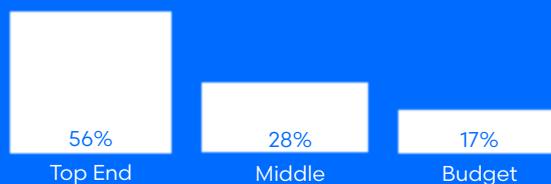
Summer 2024 also saw Storm Lillian named on the 22 August. Lillian was the twelfth storm to be named this storm season, and is the furthest through the list the Western European naming group has got since storm naming was introduced in 2015.

That's a lot of storms.

Is this Climate Change? Well, it depends on your point of view, but the UK weather is definitely changing.

Over the course of the survey the biggest influencers on our industry have changed a lot. We have had COVID and Brexit, cash flow and the Internet. It is perhaps only the weather that has been consistent.

Would you describe most of those sales as being at the top-end of the market, budget conscious or somewhere in between?



Over the fourteen years of the survey we have often been surprised by how resilient the top-end of the market is. Surviving recession, economic downturn and cost of living crisis the wealthy keep on spending money on their health. In our case, that means spending on wet leisure.

That isn't to say that these are 'money-no-object' purchasers. These are people looking to spend a little more to get the best possible result. They are as careful of their money as anyone, but they do have rather a lot of it.

From a YouGov survey, these are some insights into the top-end customer.

"I will always choose something customisable over something standard." People want their pool, spa or sauna to be unique and bespoke.

"I am willing to pay more for luxury brands." But they have to be of superior quality." We are constantly told that customers will pay more for the very best.

"I think luxury goods are a good investment." They often turn out to be cheaper in the long run.

A pool, spa or sauna certainly can be an investment and it is often seen as a reward for the purchaser. These are triggers that make it easier for them to spend significant amounts.

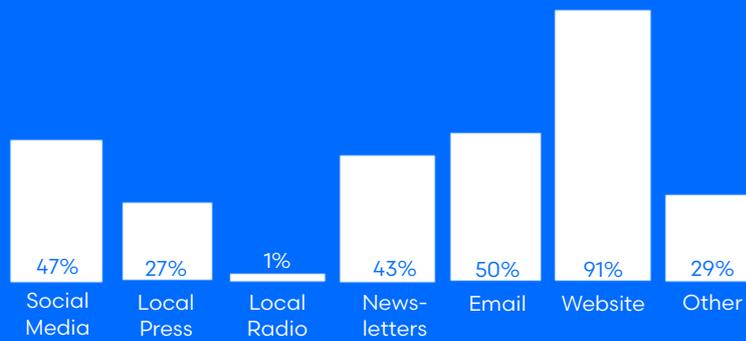
What marketing and advertising do you do for your business?



Marketing can make more of a difference to a business than almost anything else. Technical know-how and practical skills are only valuable to your business once you have attracted clients who want to pay you to use them.

It's quite surprising just how much the marketing landscape has changed during the last fourteen years.

What marketing and advertising do you do for your business? (Graph from 2012)



Social media has grown from its infancy to a position of dominance.

Local press has been crumpled up and replaced with emails and newsletters.

Local radio is attempting a comeback.

The other channels stay much the same.

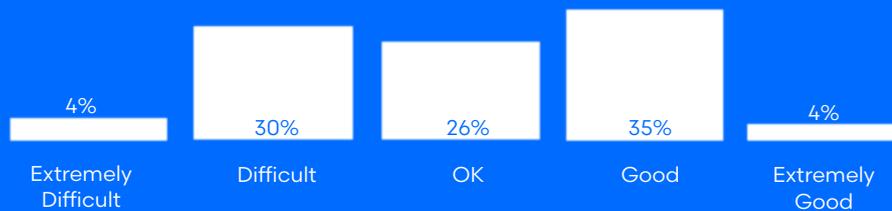
What we find in the comments section is that word-of-mouth trumps everything else. Which is interesting because testimonials and social marketing are just managed forms of word-of-mouth.

“Customer recommendations have been instrumental in our success in securing new build work.”

“Direct email marketing to our existing customer base. We have a large client base and they tend to tell others about us and our services as our working radius is quite small, to keep costs down.”

What were business conditions like this year?

On the following scale. how did you find business conditions this year?



The graph this year is much flatter than normal. 30% of respondents reported a year that was worse than average while 34% reported having a year that was better than the middle range of 'OK'.

The two extremes, difficult and good, scored less than 5% each. Across the industry, the two 'extremes' cancel each other out leaving us with a year that is merely 'OK'; neither good nor bad.

In fact, the economy as a whole showed a very similar pattern. The economy walked the line between a slight expansion and then contraction for much of the year.

2024 did see the advent of the cost of living crisis characterized by high inflation, rising prices, and struggling wages. Although inflation has fallen from its peak, the cost of living crisis is still ongoing for many households.

What will business be like next year?

This little piece of fortune telling really only highlights one thing; that people in the industry pretty much expect next year to be like the year just gone.

On the following scale, how do you expect business conditions to be next year?



If anything it shows we are optimistic about 2025 with 17% of respondents looking forward to an Extremely Good year.

There will, of course, be challenges and we asked what they might be.

“Internet and poor weather,” came up as they have done year after year, although you might expect more people to see the Internet as a positive bearing in mind how most businesses are run.

“The weather will be the biggest factor, with staffing and business costs having a significant impact.” A lack of trained staff comes up strongly this year as it has done in numerous years before.

One respondent foresees that, **“First time spa buyers will likely be the lowest level in 2 decades.”**

But another industry member sees a ray of sunshine through the economic clouds. **“To keep our services & prices competitive during the cost of living crisis, with uncertainty over energy prices & the weather is always a major concern. But if the sun is shining, people spend money on pools.”**

Sector by sector

To finish for this year we quickly look at top line feedback for each of the three main wet leisure industry sectors.

Hot tubs and spas.

The respondents are showing an almost 50% fall in spa sales although this may not be true across the entire industry.

Certainly spiralling energy costs have hit hot tub sales worst of all sectors. It may also be true that the market is saturated with anyone who wanted a spa having bought one in 2021 and 2022. It's also true that hot tub sales can be severely affected by the weather. It seems ironic that spa dealers are now adding ice-cold plunge pools to their offering.

Indoor and outdoor pools.

The pool sector shows some respondents reporting growth and an equal number showing a decline so, across the industry as a whole, there is little change although one respondent said, *"Business has gone back to roughly what it was pre Covid."*

Sauna and steam.

46% of respondents report sauna to be a growing sector of their business.

To a large extent it seems sauna's time has arrived. They have excellent health and wellbeing credentials. They make an impressive bespoke addition to any home and they are more energy efficient than a pool or spa.

Finally, of course, saunas aren't affected by the weather.

In fact, *"There has been resurgence in the popularity of home saunas this year - mainly down to existing spa owners looking to add to their wellness projects and an increase in awareness of the health benefits."*

And finally.

This year the survey has once again had the support of a number of industry bodies but the most important contribution has come from the people who have responded to the survey.

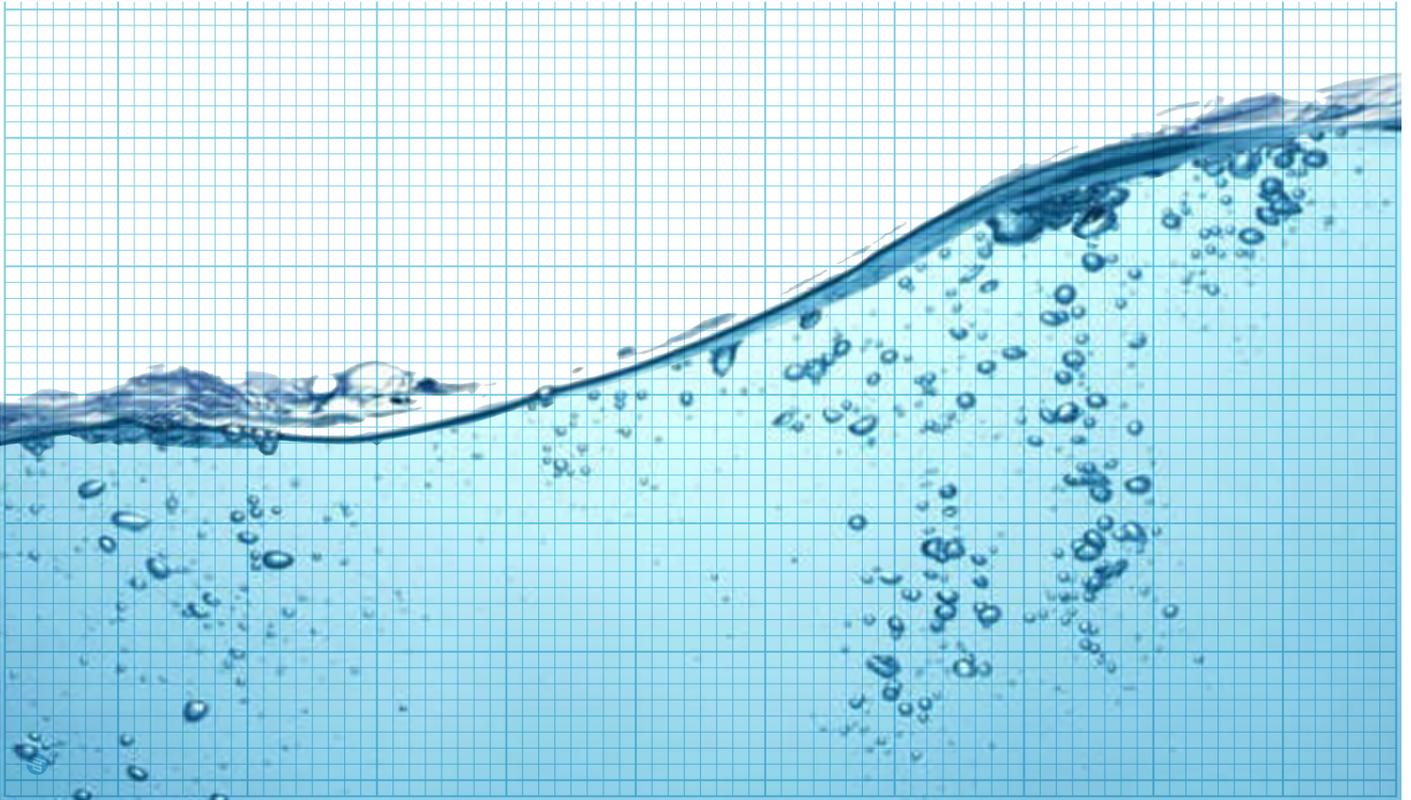
Please remember to take part in next year's survey when it comes out in October





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